



BOTSWANA REVIEW

30TH EDITION













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www.choppies.co.bw **REPUBLIC OF BOTSWANA**

BOTSWANA TRAINING AUTHORITY

Mandate

Botswana Training Authority (BOTA), a statutory body under the Ministry of Education and Skills Development, was established in January 2000 with the overreaching mandated to develop, coordinate and promote vocational training up to certificate level. BOTA draws its legal mandate from the Vocational Training Act No 22 of 1998,

a) Coordinate vocational training activities in order to achieve better inte-gration and harmonisation of the vocational training system;
b) Monitor and evaluate performance of the vocational training system being devel oped in order to ensure the successful performance of all training activities; and
c) Advise on policy related issues of vocational training.

Vision Statement

BOTA will be world class coordinating body for the development of quality vocational skills

Mission Statement

We co-ordinate an integrated accessible vocational training system that meets the needs of learners and industry through development of standards, quality assurance, policy advise monitoring and evaluation.

Values Statement

BOTA is committed to the following values that will guide the organization in achieving its vision and mission:

~ Customer Focus
~ Intergity and Botho
~ Innovation
~ Team work
~ Commitment to people and development

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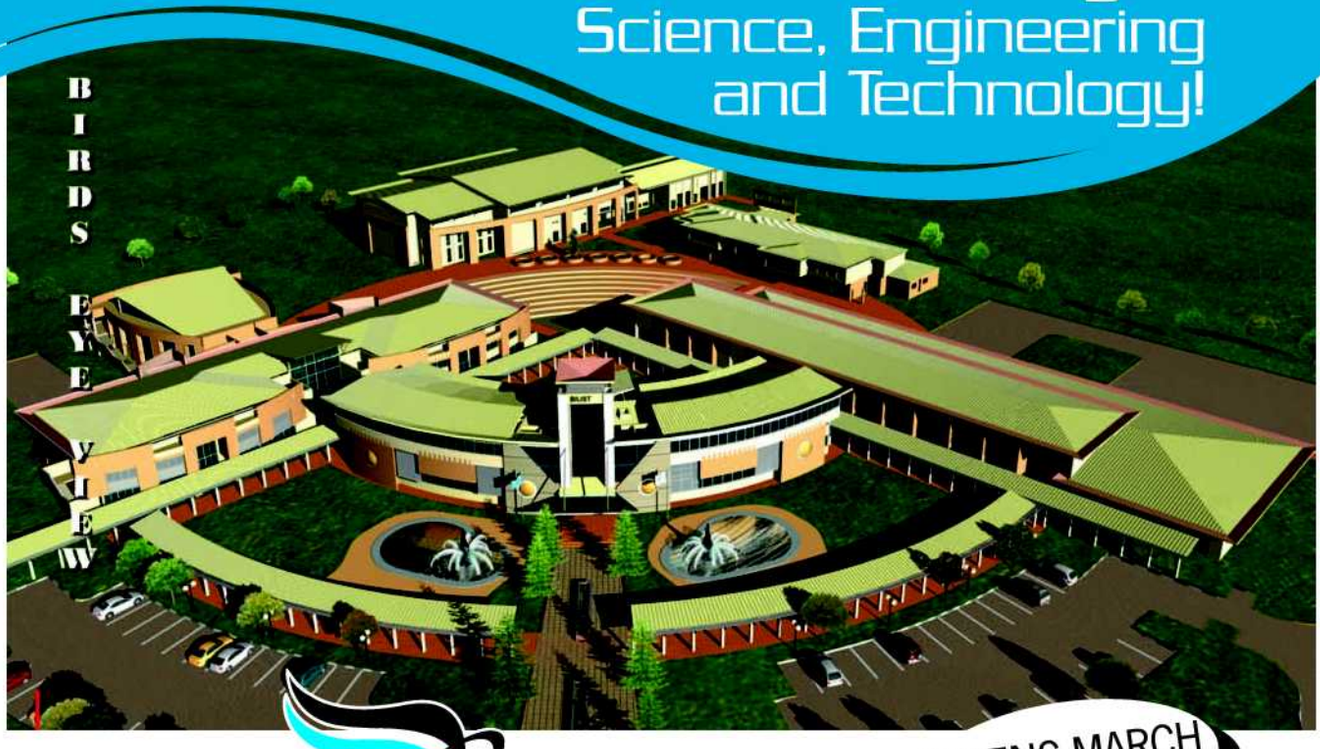
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OPENS MARCH 2011

BIUST

BOTSWANA INTERNATIONAL UNIVERSITY OF SCIENCE & TECHNOLOGY

Mandate:

A National Strategic initiative to expand and diversify science, engineering and technology education and to champion relevant industry research which is necessary to facilitate the required diversification and sustainable socio-economic development and growth in Botswana, the region and globally.

Academic focus:

- *College of Engineering*
- *College of Sciences*
- *College of Technology*
- *College of Business and General Education*

Unique Features:

- *Innovative undergraduate programmes*
- *Research based graduate programmes*
- *Relevant applied research*
- *SADC and global focus*

BIUST - Friend of the Business Community

BIUST has started to collaborate both the local and international communities, which is views as strategic partners. Through these partnerships BIUST seeks to provide an opportunity for industries from the different sectors of the economy to make an input in the development of respective study programmes curricula. BIUST further seeks to address the scarce skills gaps caused by inadequate supply of scientists, engineers and technologists.

Statements from the BIUST Vice Chancellor:

"... the new University would admit whose who are interested in pursuing careers in Science, Engineering and Technology ... the University would provide high quality programmes with a world-wide reputation which will not only benefit Botswana but Africa as a whole ... as the students go through their respective courses they will fit into the job market and create employment for others ... the courses will be research-based and the University will be made up of undergraduates and graduates."

BIUST Industrial and Research Parks

The BUIST Industrial Park will host businesses from both the commercial and industrial sectors. The Park is intended to provide internship opportunities for BIUST students and essential services to the BIUST and Palapye communities.The BIUST Research Park, on the one hand, will host reputable international researchers who will also serve as lecturers. The park is further intended to serve as a research centre for BIUST students.

BIUST's Main Target Groups

BIUST's main target groups include young aspiring scientist, engineers and technologists from both the local and international markets. BIUST will welcome students from abroad and those seeking transfer from local tertiary institutions or their equivalent to pursue further studies with the university. Those already working, who wish to study at BIUST will also be welcome.

Location: Palapye is 270km north of Gaborone, and 163km south of Francistown
Capacity: 6000 Students

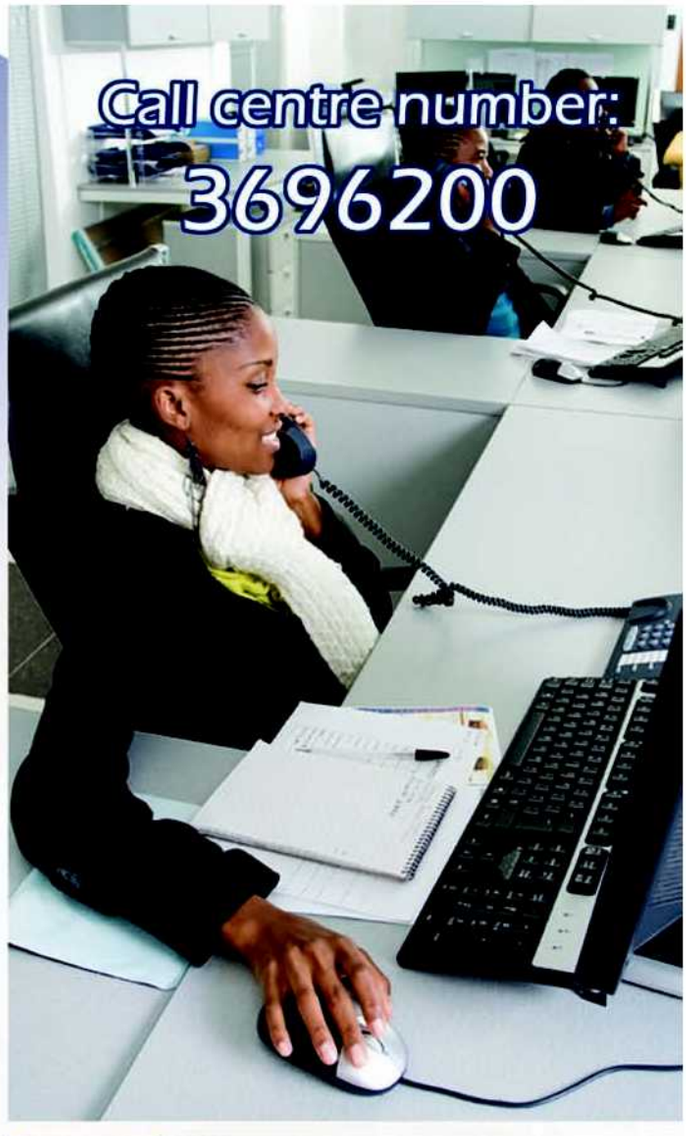
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1. UNDERSTAND WHAT YOU WANT AND WHY

A good Financial Life Planner helps you prioritise what really matters to you. How do you want your children to grow up? What opportunities do you want for family that you didn't have the chance to enjoy? What are the ingredients to your happiness? How would you spend your time, if money couldn't hold you back?

Premier Wealth Managing Director, Martin Hoko says, 'Visualise this life of your dreams. Imagine everything you want. Feel what it's like to have this life today. It's all possible as soon as you start investing consciously.'

When it's done right, Financial Life Planning propels you towards these goals. Seeing something in your mind is the first step to holding it in your hand.

2. ON A LONG JOURNEY, EVERY DAY IS IMPORTANT

With a clear roadmap in front of you, it's so much easier to stick to your financial commitments. You invest consistently. You know what you want your wealth for.

You've taken full control of your circumstances, seeing your potential in a brand new way.

Being a Premier Wealth client gives you access to a full-time Certified Financial Planner – a level of expertise and care that is available *nowhere else* in Botswana.

Do you know how compound interest works? Do you know how to get the most interest on your interest? The laws of wealth creation favour those who seize the day and get started as soon as possible. You need to give your money enough time to multiply. The most important thing is to start today.

85% of unhappy clients have bought a good product, but the *wrong* product. They're dissatisfied because they haven't been shown how to define their goals in the short-, medium- and long-term. But the fact is, if you haven't sat down with a Certified Financial Planner and thought about what you really want out of life and when you want it, of course it's going to be hard to stick to an investment strategy.

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Premier Wealth Managing Director, Martin Hoko, is Botswana's only practising Certified Financial Planner.

The Premier Wealth team hosts **financial education seminars** and **workshops** for individuals and companies, sharing our knowledge on risk, investments, personal finance and debt reduction.

We also visit individuals and businesses around Gaborone, helping them to:

- Develop **financial life plans**
- Plan for **life assurance** needs in case of disability or death
- Plan for **business insurance**
- Understand, define and plan for **retirement**
- Invest **offshore** for maximum returns, and
- Design **wills** and/or **trust** instruments

3. PLAN FOR THE UNPLANNED

Even the best-laid plans can be disrupted. Nobody can predict what life has in store for you.

You don't know if you'll crash on the way home from work today. You don't know if you'll get injured, disabled or killed. You just don't know. What will happen to your children? How are they going to get by financially if you're not there to provide? We can provide your family with P20 million in life cover in the case of your death, or P3 million in the case of your disability. We want to be there for you no matter what.

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- The books you read, and
- The people you meet.

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KGOTLA COMMUNICATIONS



BOTSWANA EXAMINATIONS COUNCIL

Who we are

The Botswana Examinations Council (BEC) was established by an Act of parliament as a body corporate governed by a Council. This Council has fourteen members appointed by the Minister of Education and Skills Development, and has representation of the Ministry of Education and Skills Development, the University of Botswana, private schools, teachers' organizations, the private sector, the public, Botswana Training Authority, Botswana College of Open and Distance Learning, the Tertiary Education Council, Botswana Police Service, and the Directorate of Public Service Management. The organisation has been established as a para-statal to execute the examination of the national curriculum for the Ministry of Education and Skills Development.

Our Function and responsibilities

BEC is mandated under section 5 of the Botswana Examinations Act No. 11 of 2002, 'to conduct school examinations and any other examinations for the Ministry and issue certificates in respect of such examinations'. BEC's key business activity is the development, administration, accreditation and certification of school examinations in the primary and secondary education sub-sectors.

The specific functions and responsibilities of Botswana Examinations Council are as follows:

- To develop an assessment policy framework
- To ensure availability of appropriate assessment programmes and examination tools
- To determine examinations procedures for all aspects of the examinations process for examinations it conducts
- To manage and administer the examination and certification process for the primary and secondary sub-sectors
- To make all logistical arrangements for the marking of examination scripts and products
- To regulate all examinations it conducts
- To accredit all examination centres, including schools as a quality assurance mechanism for all examinations it conducts
- To issue results of examinations
- To issue certificates in respect of such examinations

Botswana Examinations Council has taken over the responsibility for the development and administration of all national primary and secondary schools examinations including the Primary School Leaving Examination (PSLE), Junior Certificate Examination (JCE) and the Botswana General Certificate of Secondary Education (BGCSE) from the Examinations, Research and Testing Division (ERTD) of the Ministry of Education and Skills Development. The Council therefore carries the accountability for policy, strategy, delivery and quality assurance of all aspects of primary and secondary education examinations, including the establishment and maintenance of standards / achievement targets and the assessment process.

BOTSWANA EXAMINATIONS COUNCIL

Our Vision

•Maximised individual potential through globally competitive qualifications.

Our Mission

•To advance the quality of education through valid assessment.

Our Values

Botswana Examinations Council has adopted a set of values that act as the behavioral code that guides all employees as they execute the organization's mandate.

1. Excellence - We have passion for quality work and outstanding performance and promote innovative and creative solutions.

2. Integrity - We uphold best practice standards, honesty, professionalism and ethical behaviour.

3. Staff Welfare - We are committed to the welfare, empowerment and development of staff through a supportive and nurturing environment.

4. Customer focus - We are prompt and responsive to the needs of both internal and external customer at all times.

5. Collaboration - We are committed to creating and sustaining effective partnerships with all stakeholders to enhance service delivery.

6. Transparency - We are open in all matters of public interest while safeguarding confidential information.

7. Botho - We are committed to cultivating a work culture that is characterized by mutual respect, courtesy, compassion and sharing.

BEC Graphics

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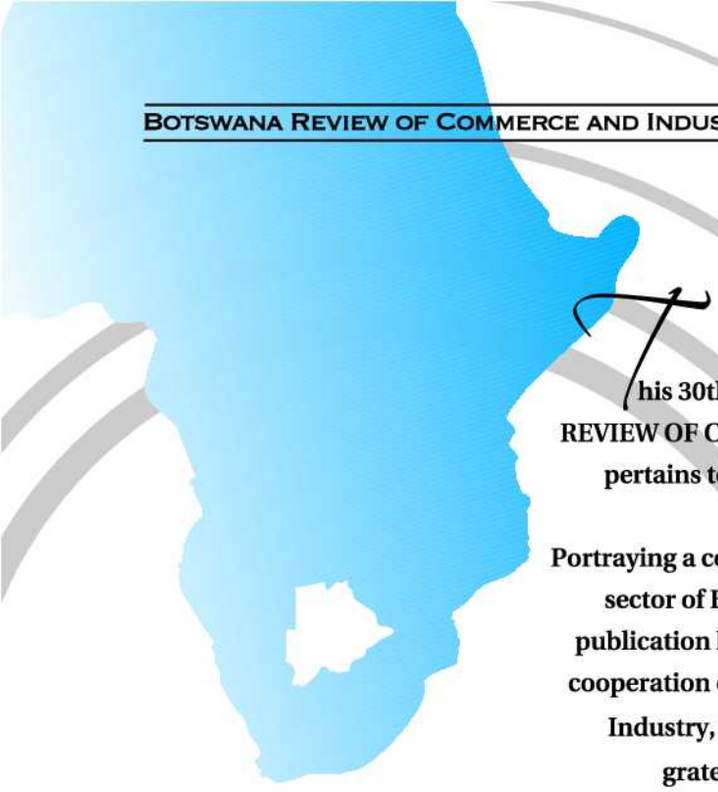
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- *Budget Speech 2010 and National Development Plan 10 (2009 - 2016), presented by the Honourable OK Matambo, Minister of Finance and Development Planning;*
- *Bank of Botswana Annual Report 2009;*
- *Botswana Population and Housing Census 2001*

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FOREWORD

1. Botswana has made considerable progress in the past few decades in terms of economic growth, employment creation, diversification and poverty reduction. Against the backdrop of a market-driven economy and democratic system of government, the success of the diamond mining industry over this period has led Botswana to be rated the best-performing economy in Africa – even one of the best in the world – and enabled it to make significant human and infrastructural investments. It thus comes as no surprise that in the United Nation's 2009 Human Development Report, Botswana's ranking is substantially above the regional average and second only to Mauritius in the Southern African Development Community (SADC).

2. While diamond mining has created a platform for growth, it is recognised that mineral revenues will decline substantially over the next two decades. For this reason, economic diversification continues to be promoted, and the values of a free enterprise economy encouraged through the drive to create a more investment-friendly environment in which the private sector can flourish. It is thus pleasing to note that Botswana is also one of the regional leaders in economic freedom, being ranked 2nd out of 46 countries in Sub-Saharan Africa and 28th in the world in the Heritage Foundation's 2010 Index of Economic Freedom.

3. At present, government's focus lies on reversing the negative effects and continuing fallout from the global economic crisis. Appropriately, the theme chosen for the 2010/11 Budget is ***'Transforming our Economy after the Crisis: 2010 and Beyond'***. This recognises that, while the crisis threatened to stall the hard-earned progress made toward achieving the objectives of Vision 2016 as well as the Millennium Development Goals, Botswana is up to the task of implementing strategies to resume rapid economic growth, while broadening sources of growth beyond the mineral sector to make its economy more resilient to external shocks.

4. This aspiration requires the concerted efforts of government, the private sector and the country's development partners. Furthermore, it makes it imperative that new opportunities for economic growth are found, and underlines the need to foster strategic and highly productive investments in both people and infrastructure, while streamlining policies to enhance private sector participation. The many reforms already undertaken, as well as those currently in the pipeline, are serving to improve the business environment in Botswana and make it an even more attractive prospect for investors.

5. Part and parcel of the drive to attract additional foreign direct investment is the marketing and promotion of the lucrative opportunities that exist in Botswana for private sector investment. It is thus essential to take advantage of current promotional tools and publications that help to disseminate information to potential investors on the country's many assets. The ***Botswana Review of Commerce and Industry***, which is now in its 30th year, continues to be the ideal medium for promoting the country's interests, both at home and abroad, and informing business people and investors worldwide on Botswana's business environment and key economic sectors, as well as trade policies, development programmes and investment incentives.

6. Finally, while recognising the huge potential that Botswana holds, the process of moving the country's development agenda forward should not be at the expense of its future economic goals. Government has therefore pledged to exercise caution in borrowing and in the use of accumulated cash reserves to finance development initiatives, having stated that every project must more than pay for itself in terms of current and future benefits to justify the extra cost of borrowing.

7. The medium-term debt management strategy should help to keep this commitment on track. Public finance reform, along with the commitment in the 2010 Budget to achieve a balanced budget by 2012, should also go a long way towards helping Botswana regain its sovereign credit ratings, as assigned by Moody's and Standard and Poor's, which were the highest in Africa for close on a decade.

==========

During 2010, the International Monetary Fund stated in its World Economic Outlook that Botswana is among select Sub-Saharan economies expected to expand by more than 5 percent during 2010 and beyond, on the back of rapidly normalising commodity prices and global trade. It foresees economic expansion of 6.3 percent in 2010 and 5.1 percent in 2011, with growth averaging around 5 to 6 percent between 2010 and 2015.

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INTRODUCTION

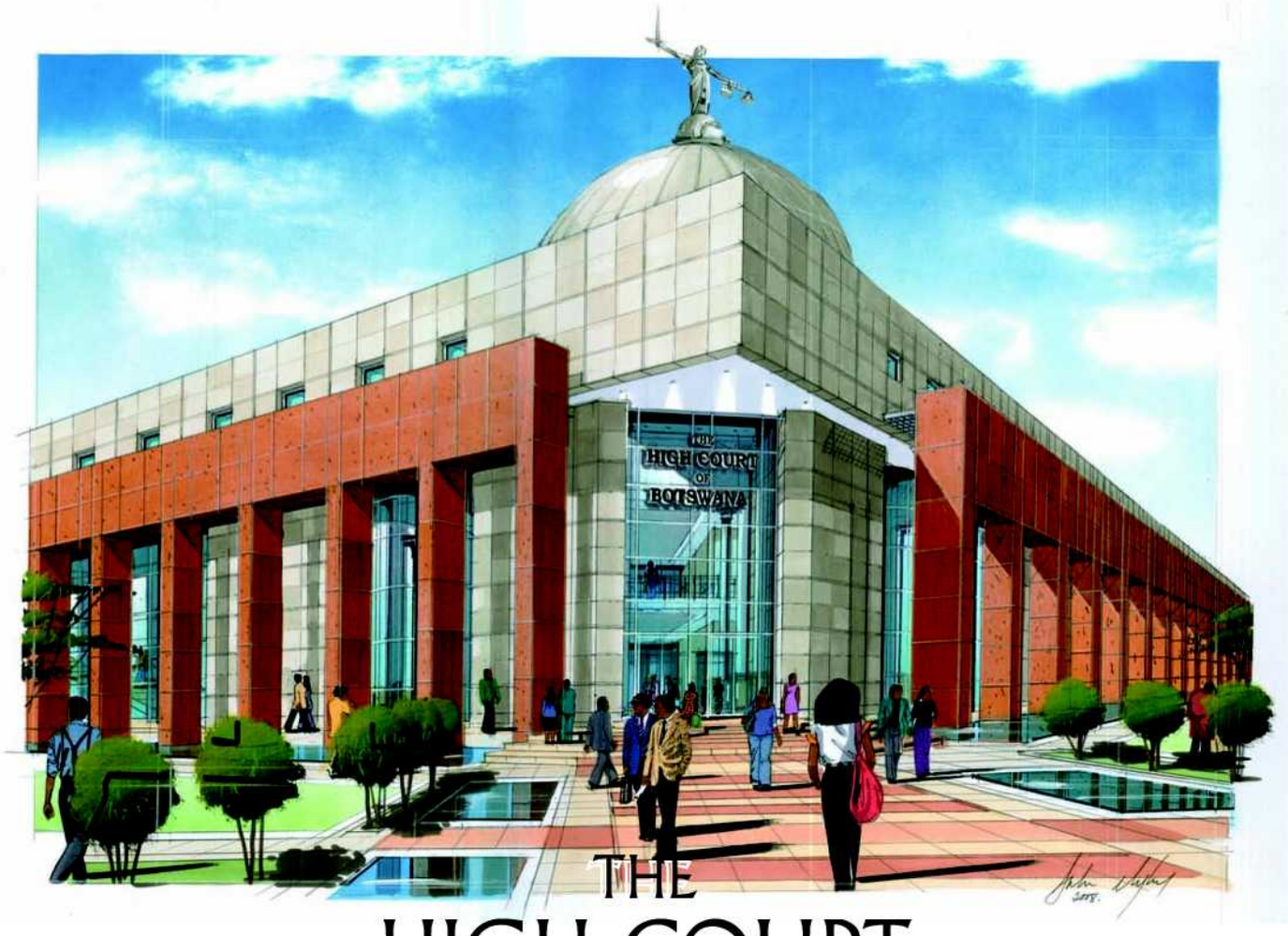
Since its independence in 1966, Botswana has maintained one of the world's highest economic growth rates, largely due to revenues earned from diamond mining, and more recently by stronger growth in the non-mining economy as the mining sector has matured. As a result, real per capita income increased from US $250 in 1960 to US $4 800 in 2008 (in constant 2000 US $). Prudent management of diamond revenues, together with high minerals prices, has resulted in large fiscal and external surpluses in recent years.

Today, the country enjoys an admirable reputation for its prudent macroeconomic policies and good governance, and has made considerable progress in

Through sound macroeconomic management, supported by strong institutions and good governance, Botswana has transformed itself from one of the poorest nations in the world to a middle-income country.



GABORONE SKYLINE



THE HIGH COURT OF BOTSWANA

The Judiciary

The headquarters of the Judiciary is in Lobatse, where the High Court and the Court of Appeal have their seat and the Judiciary is administered. The Judiciary is established under the Constitution as an independent arm of Government. The head of the Judiciary is the Chief Justice. Under him are Judges, Registrars and Magistrates.

Function of the Judiciary

The major function of the Judiciary is to interpret the law and to resolve disputes between citizens, the state or other organizations. The Judiciary must also ensure that government acts according to the constitution through a review process of their decisions. The Court of Appeal is the highest and final court in the land. The High Court is a superior court of record and has unlimited jurisdiction to hear all criminal and civil cases that occur in Botswana, while Magistrates' Courts do not have powers to hear cases attracting capital punishment.

Administration of the Courts

The Registrar and Master of the High Court is the Chief Executive Officer of the Administration of Justice (AOJ). He is assisted by the Deputy, Senior Assistant and Assistant Registrars. The Administration of Justice has four (4) major divisions namely Legal, Judicial, Master's and General. Generally the Registrar's office performs the following functions:

1. Management of court case
2. Assessment of damages
3. Taxation of bill of costs
4. Assessment of whether a litigant is a pauper
5. Assessment of security for costs
6. Granting Default Judgment
7. Drafting and signing of Court orders
8. Sheriff's functions
9. Magistrate's affairs
10. Administration of Oaths for legal practitioners
11. Accounting officer of the Judiciary
12. Master's functions

OUR VISION:

Access to Justice for all by 2016.

OUR MISSION:

To uphold human rights, democracy and the rule of law in accordance with the constitution of Botswana.

OUR VALUES:

In striving to deliver our Vision and Mission, we will work within these values:

- Integrity
- Professionalism
- Transparency
- Quality service and courtesy
- Empowerment of our team
- Personal responsibility
- Teamwork
- Timeliness and Responsiveness

Contact:
Principal Public Relations Officer, Janet H. Mudongo
Admin of Justice, Lobatse High Court, P/ Bag 001, Lobatse
Phone: +267 5330396 Fax: +267 5332317

The Hierarchy of the Courts

The Court of Appeals

The Court of Appeal is the apex Court, the highest and final court in the land. The Court is the final arbiter of all legal matters in Botswana.

The High Court

This court was created as a superior court of record with unlimited original jurisdiction to hear and determine any criminal and civil cases under any law, for cases of all types, from family matters to Criminal matters.

The Magistrates Courts

Magistrates courts are subordinate to and controlled and supervised by the High Court. The Magistrates try the bulk of the offences committed in this country and they handle the bulk of common disputes between ordinary citizens of Botswana.

Court of Appeal

- Lobatse (+267) 5330 396/ 7

High Court

- Lobatse (+267) 5330 396 Fax: (+267) 533 2317
- Francistown (+267) 241 2125/ 6244 Fax: (+267) 241 6840

Magistrate Courts

- Gaborone - Village - (+267) 395 6381
- Broadhurst - (+267) 395 6381
- Extension II - (+267) 395 6381
- Lobatse - (+267) 533 0540
- Kanye - (+267) 5440276/ 78
- Jwaneng - (+267) 5880628
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economic and social development. These gains comprise: reduction in the number of people living in absolute poverty; increased access to education, health facilities and potable drinking water; provision of basic shelter; growth in jobs; considerable diversification of the economy; sustained economic growth as well as an improved investment climate; to name but a few.

==========

Botswana's annual real GDP growth averaged nearly 10 percent per year between 1960 and 2008.

==========

Despite this impressive progress, social challenges remain, such as poverty, unemployment and HIV/AIDS. While Botswana has weathered the global recession relatively well, lower mineral revenues notwithstanding, the economy continues to rely heavily on diamond mining, which is subject to the vagaries of international markets, as well as being expected to level off over the next two decades. The country needs to raise its productive potential and attract additional private capital through promoting trade and financial sector development, while strengthening institutions that enhance investment.

Global performance indices

Botswana is a regional leader in economic freedom. In the Heritage Foundation's 2010 Index of Economic Freedom, it is ranked 2nd out of 46 countries in Sub-Saharan Africa and 28th in the world, with an overall score well above regional and world averages, and 0.6 better than last year.

The country is in 3rd place regionally and 45th place worldwide in the World Bank's 2010 Ease of Doing Business Report. Furthermore, the World Economic Forum's 2009/10 Global Competitiveness Index ranks Botswana 66th out of 133 countries. The same report rates Botswana third in Africa after Tunisia and South Africa.

For the past decade, Botswana has been ranked within the investment-grade category by international rating agency Standard and Poor's. Although its long-term sovereign credit rating was down-graded from an A to an –A in the wake of the global recession, Botswana's outlook remains 'stable' due to a strong public sector external balance. Similarly, after years of sovereign ratings, Moody's Investors Service has revised Botswana's credit risk to A2 due to the downturn in the diamond industry. Nevertheless, a firm assurance by government to undertake effective public finance reform, along with the commitment in the 2010 Budget to achieve a balanced budget by 2012, should help to improve the ratings outlook.

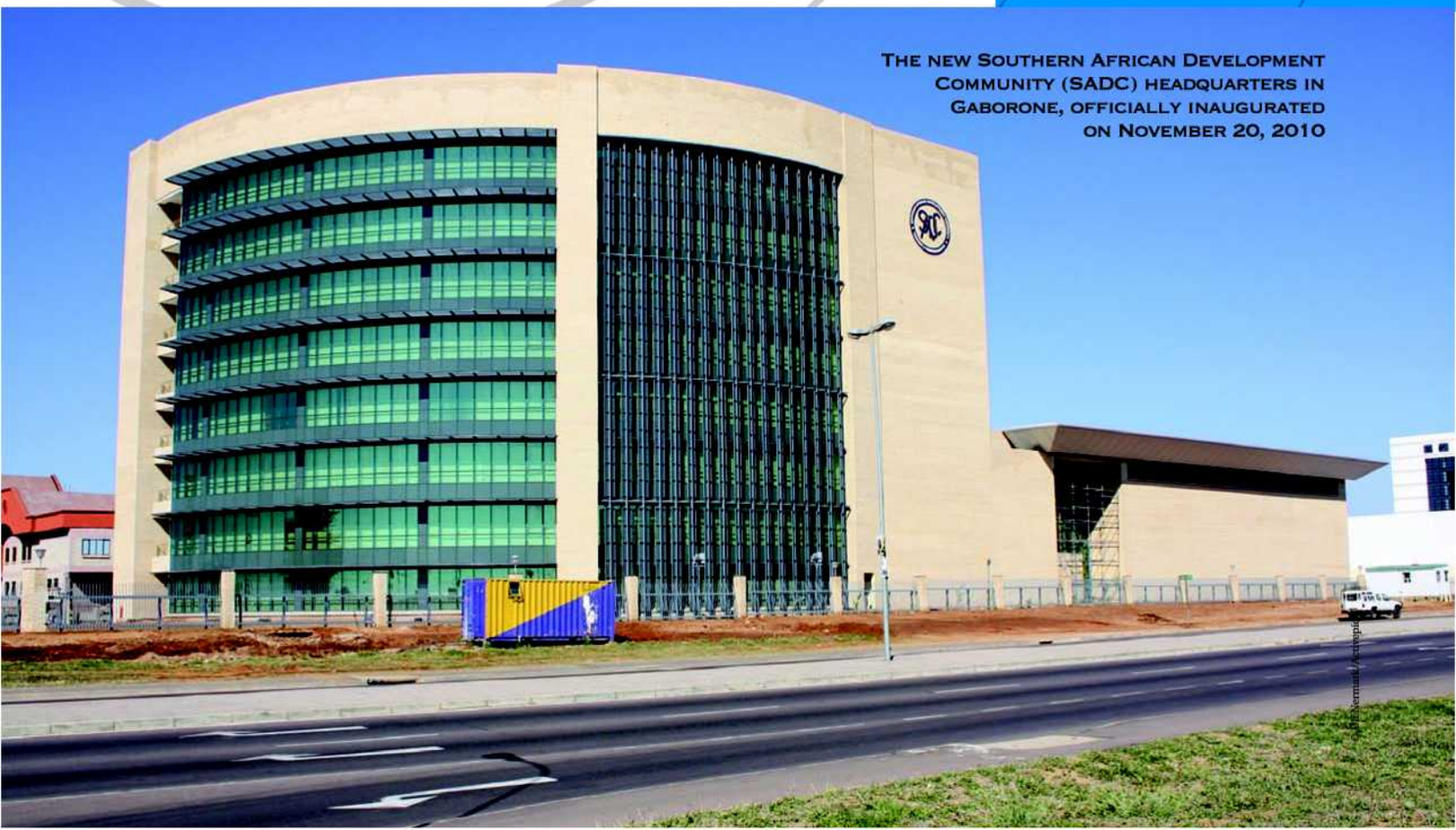
Botswana is ranked 37th out of 180 countries in Transparency International's Corruption

FLAG



COAT OF ARMS





THE NEW SOUTHERN AFRICAN DEVELOPMENT COMMUNITY (SADC) HEADQUARTERS IN GABORONE, OFFICIALLY INAUGURATED ON NOVEMBER 20, 2010

Perceptions Index for 2009 and is rated Africa's least corrupt country. It is ahead of many European and Asian countries and has a proven record of honest economic governance.

Socioeconomic development

Driven by diamond mining, Botswana's favourable economic performance has enabled it to make significant human and infrastructural investments. As a result, most communities now have access to schools, healthcare facilities (within 15 kilometres) and safe drinking water (81 percent).

In the United Nation's 2009 Human Development Report, Botswana's Human Development Index (HDI) ranking of 125 out of 182 countries is substantially above the regional average and second only to Mauritius. While life expectancy rose significantly in the 1970s and 1980s, the HIV/AIDS pandemic saw a huge reversal in this trend – from 65.3 years in 1991 to 53.4 in 2007. In terms of *Vision 2016*, there should be no new HIV infections by 2016. During the past several years there has been accelerated progress towards this goal, and HIV prevalence rates, both at the national level and for most age groups, have dropped.

Compared to continental averages, Botswana ranks high in literacy – 93rd in the world, according to the latest UN Human Development Report, with 82.9 percent of those aged 15 and above being literate. Furthermore, the country's gender empowerment measure (GEM), which looks at women's participation in economic and political life, places it in 65th place out of 109 countries.

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AFRICA'S MOST PEACEFUL COUNTRY

Botswana is ranked the most peaceful country in Africa – and 33rd in the world – in the Global Peace Index (GPI) for 2010.

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Although achievements have been made in areas such as education, health and infrastructure development, poverty persists, and the UN's Human Poverty Index (HPI-1) value of 22.9 percent puts Botswana 81st among 135 countries. In an effort to realise the aspirations of *Vision 2016* as well as the Millennium Development Goals, the Botswana Core Welfare Indicators Survey is currently underway to provide a comprehensive set of indicators for monitoring progress on the National Strategy for Poverty Reduction. In addition, government, supported by the UNDP, developed a poverty reduction initiative in 2007 called the Community Resilience Project, which is currently being piloted in a number of villages.

TOPOGRAPHY

Botswana is a landlocked nation straddling the Tropic of Capricorn at the centre of the southern African plateau. It shares borders



BOTSWANA MEAT COMMISSION PREMISES AT LOBATSE

©Ulf Nermark/Activepic

with Namibia to the west and north, Zambia and Zimbabwe to the north-east, and South Africa to the east and south.

Comprising an area of about 582 000 square kilometres, Botswana has a mean altitude of around 1 000 metres above sea level. Gazetted forest reserves cover 4 555 square kilometres, which is only 0.8 percent of the total land area. Much of the country is flat, with gentle undulations and occasional rocky outcrops. Vegetation consists mainly of savannah, and indigenous trees include the mophane, camel thorn and baobab.

The hills and deep valleys of the eastern portion contain the highest and lowest points, ranging from 1 489 metres at the Tsodilo Hills to 513 metres at the junction of the Limpopo and Shashe rivers. The Okavango – one of southern Africa's longest rivers – flows through north-western Botswana, fanning out into a huge delta some 15 000 square kilometres in extent. In the central north-east there is a large area of calcrete plains bordering the Makgadikgadi pans. The rest of the country is covered with the thick sand layers of the Kgalagadi (Kalahari) Desert, occupying about 84 percent of the land area and supporting scrub and grass vegetation.

CLIMATE

Situated close to the subtropical high pressure belt of the southern hemisphere, Botswana has a dry, semi-arid climate. Rainfall is seasonal, with uneven distribution. Most rivers flow seasonally, except in the Northwest District, where the major rivers are perennial. Ground water exists at varying depths in most parts of Botswana.

The mean annual rainfall of 450 millimetres ranges from 250 millimetres in the south-west to over 650 millimetres in the north-east. The main rainy season occurs between November and April, with significant variations from year to year and periods of severe drought. As a rule, annual rainfall is exceeded by loss of moisture through evaporation and transpiration by plants, with the result that agriculture without irrigation is only viable for approximately six seasons out of ten.

Despite the fact that the northern two-thirds of the country lies within the tropics, the climate is more temperate than tropical due to land altitude and distance from the oceans. Periods of bright sunshine can last between eight and ten hours daily, with generally clear skies and low relative humidity. Temperatures are very high in summer, and while winter days are mild, winter nights often see temperatures reaching below zero.

Average maximum daily temperatures range from 22°C in July to 33°C in January, while average minimum temperatures in the same months range from 5°C to 19°C. The temperature range is wide, and while the eastern area has a somewhat less harsh climate, the southern Kgalagadi can experience extremes of less than -5°C at night and up to 43°C during the day.

Seasons

Spring (Sept–Oct) is short, with hot, dry days and hot nights
Summer (Nov–Mar) sees long very hot days and short nights with periodic rain and thunderstorms
Autumn (Apr–May) has some hot days followed by cool or even cold nights
Winter (June–Aug) is characterised by cold, dry and windy days with very cold nights

NATURAL RESOURCES

An extensive variety of mineral resources are found in Botswana, and exploration to unlock new resources is ongoing. Igneous activity has occurred throughout the country's geological history, the most economically significant being the kimberlite pipes with their wealth of diamonds. There are established copper-nickel and coal mining operations, with other exploitable copper and coal resources under development. Large salt and soda ash deposits, gold and granite are mined, and numerous other minerals are known to occur in significant quantities.

Botswana's other important natural resources are range and arable land, as well as rich wildlife habitats supporting large animal populations. The country's natural wealth lies in its unique scenic beauty, strikingly rugged wilderness areas, the complexity of an unremitting vastness, and the timelessness of grassy plains with their pan complexes and unusual mix of bird species.

THE ECONOMY

When Botswana gained its independence in 1966, the real gross domestic product (GDP), valued at 1993/94 prices, amounted to P908.6 million. Of this total, agriculture accounted for P387.6 million (about 43 percent), while

A Long Term Vision for Botswana

LONG TERM VISION FOR BOTSWANA
VISION 2016

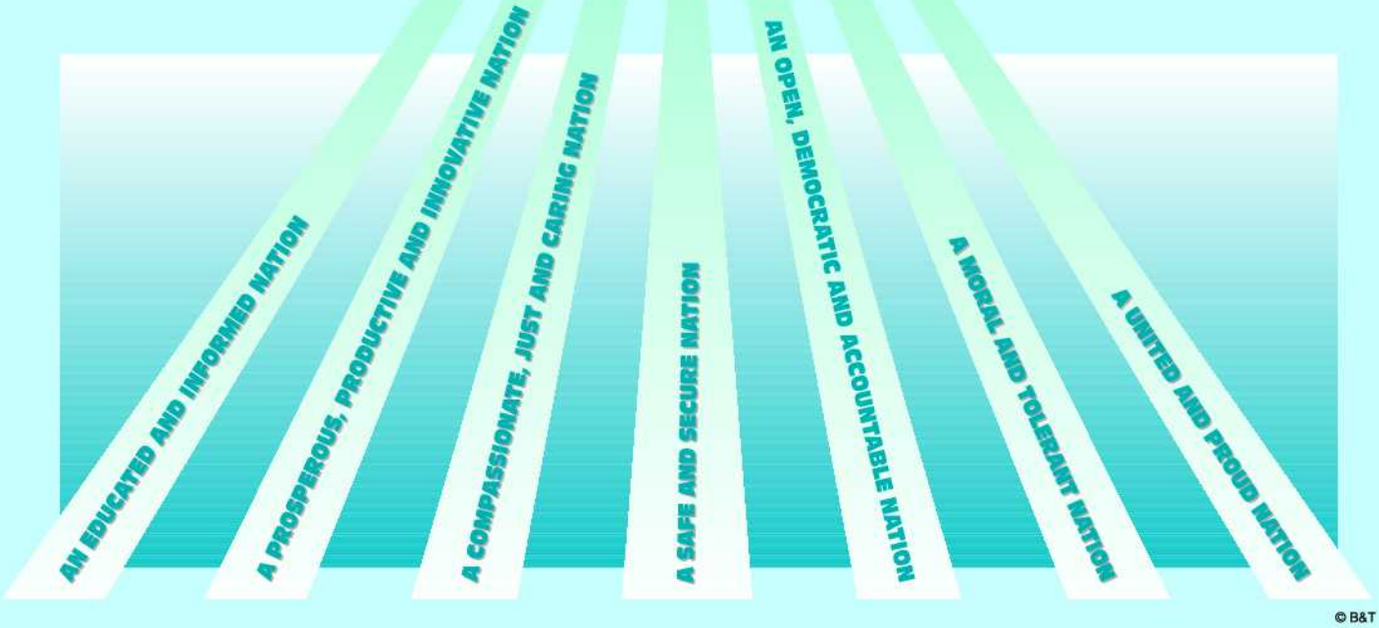
VISION 2016

Towards Prosperity For All

WHAT IS VISION 2016?

Vision 2016 is a Botswana blueprint that seeks to propel Botswana's socio-economic and political development into that of a competitive, winning and prosperous nation. Vision 2016 reflects as closely as possible the aspirations of Batswana about their long term future. It is a result of extensive consultation through a Presidential Task Force appointed in 1996.

WHAT CONSTITUTES THE LONG TERM VISION?



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banks, insurance and other business services contributed P183 million (around 20 percent). The little industry there was consisted of the abattoir in Lobatse and a few businesses in Francistown. In terms of employment, most Batswana were involved in subsistence agriculture, and a significant proportion of the labour force worked as migrant labourers in the South African mines.

From being almost non-existent in 1966, mining was by 1986 contributing around 47 percent to GDP. Agriculture, on the other hand, had declined from 43 percent to less than 5 percent by 1986. Over the past two decades, the focus of government policy has been on diversifying the economy away from dominance by the minerals sector which, while contributing substantially to growth, GDP, export shares and government revenues, remains a finite resource with a value that is dependent on demand from outside the country. Another crucial issue is that mining is by nature capital rather than labour intensive, and its contribution to employment is relatively small.

For some time government expenditure has been based on assessed economic and social benefits and covered by current revenue, grants and borrowing, mainly on concessional terms. Given the low expenditure relative to revenue, there has been an accumulation of substantial government savings and, in turn, foreign exchange reserves, which have provided the country with an important cushion against negative shocks while enabling the build-up of a strong base of financial assets to support future development.

Monetary and banking policies contribute to macroeconomic and financial sector stability, with the exchange rate policy used to support the emergence of non-traditional exports and import-competing production, and also to occasionally moderate inflation. Overall, the exchange rate policy has mitigated the dangers of an overvalued currency that often accompany abundant mineral revenues.

Economic development and public expenditure programmes are guided by Botswana's national development plans. National Development Plan 10 (NDP 10) covers the period from 2009 through to 2016. Its main thrust is to accelerate the diversification of the economy in view of the anticipated reduction in government revenues from diamonds in the long term, with the global economic crisis underlining the need to broaden revenue streams. This requires greater efforts to reduce constraints on private sector growth.

International, regional and domestic prospects

Estimates published by the International Monetary Fund (IMF) in July 2010 indicate that global output contracted by -0.6 percent in 2009, down from 3.0 percent in 2008. However, output is expected to rise to 4.6 percent in 2010 and 4.3 percent in 2011.

Negative growth of -3.2 percent was recorded in the advanced economies during 2009, following marginal growth of 0.5 percent in 2008. A modest but steady recovery of 2.6 percent is forecast for 2010, led by the Asian economies, while 2.4 percent growth is anticipated for the following year. It is expected that stronger growth in the United States will be offset by slightly weaker growth in the Euro zone.

Although growth remained positive in emerging and developing countries during 2009, the 2.5 percent recorded is significantly below growth of 6.1 percent in 2008. Robust growth is predicted for these economies during 2010 (6.8 percent) and 2011 (6.4 percent).

Expansion in Sub-Saharan Africa of 5.6 percent in 2008 was followed by much slower growth of 2.2 percent in 2009, with some middle-income and oil-exporting economies hard hit by the collapse in export and commodity markets. Nevertheless, this region seems overall to have weathered the global crisis fairly well, and recovery is expected to be strong, with output projected to rise to 5.0 percent in 2010 and 5.9 percent in 2011.

Economic growth slowed in most of the Southern African Development Community (SADC) Member States in 2008, with the region (excluding Zimbabwe) expected to record a marginal 0.1 percent growth in real GDP in 2009, down from an average of 5.9 percent in 2008, which in itself was less than the agreed target of 7.0 percent.

During 2009, Botswana's output contracted by 3.7 percent compared to positive growth of 2.9 percent in 2008, largely as a result of the sharp decline in real value added by the mining industry. Most of this contraction in real GDP occurred in the first quarter of 2009, whereafter the economy began to recover in response to the partial recovery of the minerals sector.

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Following the recession of 2009, it is anticipated that the economy will experience a robust recovery during 2010, with growth forecasts in the range of 6 to 8 percent.

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More positively, the IMF states in its World

Economic Outlook of April 2010 that Botswana is among select Sub-Saharan economies expected to expand by more than 5 percent during 2010 and beyond, on the back of rapidly normalising commodity prices and global trade. It predicts economic expansion of 6.3 percent in 2010 and 5.1 percent in 2011, with growth averaging around 5 to 6 percent between 2010 and 2015.

The IMF attributes part of this strong recovery to Botswana's countercyclical fiscal policy during the recession. Instead of providing stimulus packages to affected sectors, Botswana opted to maintain, and in some cases increase, spending throughout the recession as a way of supporting the economy. This resulted in the country running a deficit of P13.5 billion for 2009/10, partly financed by a P6.6 billion African Development Bank loan and a domestic bond programme. The recovery has also been helped by rising commodity prices and the country's openness to global trade.

HISTORY & POLITICS

The earliest evidence left by Botswana's original inhabitants can be found in rock art dating to approximately 23 000 BC, followed by Iron Age settlements and signs of large-scale livestock keeping in the Middle Ages. Colonisation from surrounding southern African territories began from the sixteenth century (or even earlier) with the Khoisan, Yei and Kalanga, who were later supplanted or disturbed by encroaching groups including Tawana, Ndebele, Ngwato and Pedi.

The 1800s witnessed the arrival of hunters, traders, gold prospectors and missionaries from Europe, who introduced a variety of western ideas and technologies to the region.

Successive upheavals in southern Africa during this period saw many refugees resettling in Botswana to escape colonial rule and other conflicts in neighbouring countries, with Batswana successfully defending themselves against Ndebele as well as Boer invaders.

In 1885 the Bechuanaland Protectorate of Great Britain was proclaimed, with its borders later being altered to define what is now present-day Botswana. Although administered by Britain, the Protectorate managed to maintain a degree of independence, narrowly escaping incorporation into Rhodesia by Cecil John Rhodes' British South Africa Company in 1895 and successfully avoiding transfer to the Union of South Africa in 1909 and later on. While characterised by relative peace and stability, progress under the colonial administration proved slow, with the exception of Sir Charles Rey, who mobilised funds which helped to improve the country's infrastructure and boost the cattle ranching industry.

Growing dissatisfaction with British protection and an increasing nationalism among Batswana found expression though tribal leaders, who exercised considerable power at local level. From the 1930s, demands for self-determination were increasingly vocalised through the African Advisory Council, which often found itself in conflict with the colonial administration. In 1950 Seretse Khama, Chief of the Ngwato, was deposed and exiled by the British, with riots following in 1952 to protest his exile.

In 1960 Britain approved a new constitution for Bechuanaland, with Seretse Khama appointed to the Executive Council a year later. After 80 years as a British protectorate, Bechuanaland attained self-government in 1965, becoming the independent Republic of Botswana on September 6, 1966, and maintaining a position of stability and harmony ever since. Sir Seretse Khama was elected the country's first president and served until his death in 1980. One of the world's most impoverished nations at the time of independence, the discovery of commercially exploitable diamonds in 1967 at Orapa paved the way for economic prosperity, with Botswana becoming a shining example of an African success story.

Founded in 1962 by Seretse Khama, when it was known as the Bechuanaland Democratic Party, the Botswana Democratic Party (BDP) has been in power since the first democratic elections in 1966 and continues to draw support from a wide range of Botswana's population. Mr Quett Ketumile Masire served as Botswana's second president, taking over from the late Sir Seretse Khama in July 1980 and continuing a tradition of good governance.

Constitutional amendments made in 1997 limited the presidency to two five-year terms and lowered the voting age from 21 to 18. Sir QKJ Masire voluntarily retired from office in 1998 at the age of 72 and was succeeded by his vice president and former finance minister, Mr Festus Mogae. The ruling BDP swept to victory in both the 1999 and 2004 elections, with President Mogae serving two terms in office before being succeeded by the current president, Lieutenant General Seretse Khama Ian Khama, in 2008.

The country's most recent general election was held on 16 October 2009. Seretse Khama Ian Khama was sworn in as the fourth President of Botswana after his party, the

BDP, acquired more than 45 seats in the 57-seat Parliament. The 2009 elections saw a shift within the opposition parties, with the rise of the Botswana Congress Party as a noteworthy force and some decline in the Botswana National Front.

The constitution

Adopted by Botswana on 30 September 1966, the constitution established a non-racial democracy, maintaining freedom of speech, of the press and of association, and affording all citizens equal rights. The constitution provides for a republican form of government, consisting of executive, legislative and judiciary bodies.

The President heads the executive branch of government and presides over the cabinet, initiating and directing national policy through government ministries and departments. Supreme authority is vested in the legislature, comprising the National Assembly and the President and acting in consultation with the House of Chiefs, which advises on matters affecting customs and tradition. This long lasting democratic '*kgotla*' system, passed on from generation to generation, has provided a strong base on which to build, with free political debate encouraged at all levels. Independent of the executive and legislative branches, the judiciary interprets and administers the law.

Peaceful, democratic elections are held every five years, with the Independent Electoral Commission (IEC) ensuring that elections are conducted efficiently, properly, freely and fairly. The Botswana Democratic Party (BDP) has so far won every election, with four changes of President since independence in 1966. The next elections are due to be held in 2014.

DEMOGRAPHICS

In the 2006 Demographic Survey undertaken by Botswana's Central Statistics Office (CSO), the total population of the country is estimated at 1 773 240 (of which 59 245 are non-Batswana), with a projected increase to 1 776 000 in 2008. Just over 35 percent of the population is below the age of 15 years, while 59.5 percent is aged between 15 and 64 years and 5.2 percent above 64 years. The median age of the population is 21.9 years; 22.7 for females and 20.7 for males. The non-Batswana population is considerably older, with the median age of 30.5 years. Life expectancy at birth is estimated to be 54.4 years – 49 years for males and 60 years for females – which represents a decline from the 55.6 years estimated in 2001.

About 87 percent of Batswana reside in the more fertile eastern regions where land and water resources are best. In terms of district population distribution, most are concentrated in Kweneng, Central Serowe-Palapye, Gaborone, Central Tutume, Ngwaketse and Central Mahalapye (in that order), whereas non-Batswana live mainly in Gaborone, Kweneng, Francistown, South East and Central Serowe-Palapye. At three persons per square kilometre, the country still has one of the world's lowest average population densities.

The expansion of economic activities in the mid 1970s and 1980s saw the pattern of settlement change rapidly. Once a pastoral society with a predominantly rural population, Botswana now has around 59.6 percent of its citizens living in cities/towns and urban villages, with a growing concentration of people in the centres of Gaborone, Francistown, Lobatse, Molepolole, Serowe, Palapye, Selebi-Phikwe and Maun.

Botswana has a long history and a rich culture that determines the behaviour and attitudes of its people. Family traditions and the strength of the family unit are maintained and cultural and spiritual values respected. Designed to promote social harmony ('*kagisano*') and set the broader context for the nation's objectives, the national principles of democracy, development, self-reliance and unity are derived from Botswana's cultural heritage. The country's challenge for the future lies in adapting to a changing and increasingly competitive world without sacrificing the positive aspects of its culture and values.

The people of Botswana are known as '*Batswana*' (singular '*Motswana*'). They comprise a number of ethnic groups, including the Bakgatla, Bakwena, Balete, Bangwato, Barolong, Batawana, Batlokwa, Bangwaketse, Basarwa, Baherero, Babirwa, Bakalanga, Bakgalagadi, Basubiya, Batswapong, Bayeyi, Bambukushu and Babenderu. There are also citizens of Asian and European descent, and those of mixed ancestry.

Over 70 percent of the population speak Setswana, which is the national language, although English is the main medium used in government and business. According to the CSO's 2006 Demographic Survey, most Batswana (62.7 percent) profess to be Christians, while about 27 percent cite 'God' as their religion and 7.9 percent do not follow any religion at all. '*Badimo*' is the only other religion in Botswana with significant numbers (2.2 percent).

MAIN CENTRES AND AMENITIES

Botswana's population has increased over the years, from 574 000 in 1971, to 941 000 in 1981, 1 327 000 in 1991 and 1 681 000 in 2001. The rate of population growth has been declining since 1991, growing only 2.4 percent per annum over the decade to 2001. With the growth rate currently estimated at 1 percent, the population is projected at 1 776 000 in 2008 and 1 977 000 by 2016. The population density has risen from one person per square kilometre at the time of the 1971 census to three persons per square kilometre, according to the 2006 Demographic Survey by

Gaborone became the capital city of Botswana at Independence. Most major settlements are located in the eastern part of the country.



GABORONE, BOTSWANA'S CAPITAL CITY

© Ulf Nermark/Activepic

Botswana's Central Statistics Office (CSO).

The past three decades have seen rapid urbanisation, as many Batswana have moved from rural areas to bustling cities and new urban settlements in order share in the fruits of economic prosperity. From just 9 percent urbanisation in 1971, the CSO's 2006 Demographic Survey estimates that most of Botswana's population (59.6 percent) now live in cities/ towns and urban villages. This figure is projected to reach 65 percent by 2011. An urban area is defined as any locality with 5 000 or more inhabitants, with at least 75 percent of its workforce engaged in non-agricultural activities.

The country is divided into 16 administrative districts, each with its own Department of District Administration, headed by a District Commissioner. There are city councils for Gaborone and Francistown, town councils for Lobatse, Selebi-Phikwe and Jwaneng, and a township authority for Sowa Town.

GABORONE

Gaborone is Botswana's capital city and the seat of government, as well as being the commercial and administrative heart of one of the most successful economies in Africa. Located in the south-eastern corner of the country on the Ngotwane River, just 15 kilometres from the South African border, Gaborone became the country's capital on independence in 1966 due to its pre-existing administrative offices, the availability of ample government land, the closeness of the railway line and the South African capital of Pretoria, and, most importantly, its proximity to a major water source. Declared a city in 1986, Gaborone's population is estimated at 186 007 (CSO, 2008).

Sir Seretse Khama International Airport (SSKIA) is situated close to the capital. The national carrier, Air Botswana, operates scheduled flights from Gaborone to several destinations, while numerous other carriers operate services to the capital and private operators maintain links to tourist attractions. The railway line from South Africa passes through Gaborone on its way to Zimbabwe, and a well-developed road network links the city to other centres within Botswana as well as neighbouring countries. There are four main highways out of Gaborone.

At the heart of the city, government ministries, the National Assembly, the House of Chiefs and the Archives are grouped around an attractive park called Government Enclave. At the centre of the enclave is a statue of Botswana's first president, Sir Seretse Khama, as well as a memorial to the 300 Batswana who died during World War II.

The Mall is Gaborone's original shopping area, with several embassies, commercial banks, and numerous offices, shops and restaurants encircling it. At the eastern end of the Mall is the Civic Centre, opposite which visitors can see Pula Arch, a landmark commemorating the country's independence. The University of Botswana, the National Museum and Art Gallery, and the Botswana Stock Exchange are also located near here. The National Museum and Art Gallery houses permanent exhibitions of Botswana's natural and cultural heritage as well as extensive collections of visual arts and crafts. A basket exhibition is held here every August as well as an annual exhibition by local artists in April.

Gaborone offers a choice of good quality hotels as well as conference facilities, with the impressive Gaborone International Convention Centre (GICC) and Grand Palm Hotel hosting a number of high profile international conferences. There is a 24-hour casino at the Grand Palm as well as the city's other premier hotel, the Gaborone Sun. The Boipuso Conference Centre is located within Fairgrounds, where the Botswana International Trade Fair is held annually.

Visitors will also find a range of top-class shopping centres, including the two-storey Riverwalk Mall situated on the Tlokweng Road, the upmarket Fairgrounds Shopping Mall on the western side of Gaborone and Game City shopping mall next to Kgale Hill. The Westgate and Molapo Crossing shopping centres along the Western Bypass also house a range of shops, restaurants and offices.

Impressive new developments include Phase Two of the Fairgrounds Office Park and the landmark seven-storey SADC Headquarters near the new CBD. When fully completed in 2011, Masa Centre, which is also located in the new CBD, will comprise a four-star Holiday Inn hotel and conference facilities, restaurants and boutiques, casino, seven floors of world-class offices, cinemas and an open-air art gallery. The University of Botswana Expansion Project includes a new Faculty of Health Sciences facility, with a 450-bed teaching hospital. At the same time, the Botswana Innovation Hub – Botswana's first Science and Technology Park – is being built adjacent to the Diamond Hub, near SSKIA.

The city's entertainment offerings comprise theatre as well as live music, including jazz, reggae and traditional African, while football matches, track races and cultural gatherings are a frequent occurrence at the National Stadium. The most important event on the performing arts calendar is the Maitisong Festival held every March/April.

Attractions in the environs include Gaborone Dam, where watersports may be enjoyed, and Kgale Hill, which offers lovely views as well as three walking trails. Wildlife may be seen in the Gaborone and Manyelanong game reserves. About 14 kilometres from the city, St Claire Lion Park, with its horse trails, motorbike rides, vulture restaurant, dams, game viewing and camping grounds, is a popular spot for picnics and weekend getaways.

FRANCISTOWN

Botswana's oldest and second largest town, the former 'gold rush' settlement of Francistown sprung up around the road and rail crossing to nearby gold mines. Situated at the confluence of the Tati and Inchwe rivers, over 400 kilometres north of Gaborone, the town once consisted of a single main street lined with bustling western-style saloons and supply stores running alongside the 'Cape to Cairo' railway line. Prospectors and adventurers flocked here from as far afield as Australia and America to lay their claim to a fortune in gold.

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Francistown was the site of southern Africa's first 'gold rush' in the 1870s, and takes its name from the prospector and trader, Daniel Francis.

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Today Francistown is a convenient stopover on many tourist routes, being linked by major highways to Gaborone, Zimbabwe via Bulawayo, the Kazungula ferry crossing into Zambia, and Maun, the gateway to the Okavango Delta. Francistown is the last stop on the rail route to Zimbabwe, and there is an international airport which has recently been upgraded.

The city is also an important centre for

industry and commerce, with a growing international corporate presence and a population of some 83 023 (CSO, 2008). Important manufacturing concerns include the BMC abattoir as well as clothing and textile factories and tile, ceramics and chemical industries. Numerous service industries flourish, particularly those related to the construction and transport trades.

Good accommodation and conference facilities are available, with other attractions including casinos, cinemas, nightclubs, good restaurants and sports clubs. Ongoing growth, especially in the retail sector, is evident in the many construction projects underway, especially in the central business district. There are good health facilities, which include the country's second-largest referral hospital (Ngangabwe), where a wide range of clinical specialities and more advanced diagnostic facilities are available.

Situated in a historic building in the former Government Camp, the Supa-Ngwao Museum focuses on the history of the Kalanga people, with an excellent collection of artefacts depicting the cultures and traditions of north-eastern Botswana, including arts and crafts and musical instruments.

LOBATSE

Set among hills 65 kilometres south of Gaborone, Lobatse is the second oldest urban settlement in Botswana and was considered a candidate for the nation's new capital before independence in 1966. With Otse Mountain, the highest point in the country, only a few kilometres away, it is higher in altitude than Gaborone and is thus cooler in the summer. Additionally, Lobatse is conveniently situated on the railway route. It was only the fact that water supply was limited and unlikely to improve that prevented Lobatse from becoming the seat of the new government.

A major impetus for the initial growth of the town was the construction of the Mafikeng-Bulawayo railway line at the end of the nineteenth century. The junction of the railway line with the Kanye-Zeerust road served as a stopover for travellers, and urban development began to take shape from 1897, spurred by a temporary boom in local timber cutting. The town was also the first in Botswana to have a tarmac road – a few short kilometres laid especially for the Royal visit of the Duke and Duchess of Windsor in the early 1960s. Lobatse remains central to modern transport networks. In addition to its railway line and airstrip, this pleasant town is the gateway to the Trans-Kgalagadi Highway, linking Maputo to Windhoek.

With a population of 29 689 inhabitants at the time of the 2001 census, Lobatse is the site of the High Court as well as the headquarters of the Department of Geological Survey. A market centre for most goods and services from the hinterland, the water pipeline from Gaborone and Nnywane Dam has led to the establishment of several important industries. The Botswana Meat Commission (BMC) has its headquarters here, while other major industries include Botswana Breweries, Lobatse Clay Works, Sugar Industries and Sefalana Mills, with a tannery and a can manufacturing facility having been set up here with assistance from the Botswana Development Corporation (BDC).

Interesting archaeological remains in the vicinity comprise stone walling from the area's first major settlement – a Bangwaketse village built in the late eighteenth century – at Lobatse Estates, while earlier settlements built by the Bakgwateng, a Kgalagadi tribe who lived in the area before the Bangwaketse, are evident south of Lobatse. Another structure well worth visiting is the beautiful St Mark's Anglican Church, a stone and thatch building consecrated in 1934.

Lobatse's Cumberland Hotel has undergone a refurbishment and expansion programme, and a casino has been opened. The recently-completed Lobatse Integrated Sports Facility includes a 20 000-seat Olympic-type stadium.

SELEBI-PHIKWE

Selebi-Phikwe is the fourth-largest urban centre in Botswana, with 49 849 inhabitants recorded at the time of the 2001 census. The area originally consisted of two small villages – Selebi and Phikwe – which in the 1960s were found to straddle a large copper and nickel deposit. Following the discovery of this mineral wealth, a mine and township were built in the woodland between these villages and given the name of Selebi-Phikwe.

Today this growing industrial centre, situated halfway between Kasane and Johannesburg, and 88 kilometres southwest of Francistown, is the hub of Botswana's copper-nickel-cobalt mining industry. While the town owes its rapid growth primarily to the presence of the copper-nickel mine, its economy has diversified into other areas in the past decade. The completion of the tarred road from the Martin's Drift border post has made this mining town a convenient half-way stop for tourists travelling between Johannesburg (via Ellisras) and Botswana's northern tourist attractions.

The town is a priority centre for regional industrial development and is a principal location for large-scale light manufacturing. In addition to the mining and processing of copper-nickel, industries that have been established include garment manufacturing, jewellery, automotive accessories, structural engineering, sanitary ware, furniture and mining accessories. A detailed six-year medium term strategy and financing plan has been developed in order to ensure the viability of Selebi-Phikwe beyond the life expectancy of the mine in 2013, and is being spear-headed by the Selebi-Phikwe Economic Diversification Unit (SPEDU).

Visitors to the town will find modern shopping malls, hotels, banks, libraries, a golf course and an international airport. Good roads connect Selebi-Phikwe with major centres to the north and south and there are a number of car-hire companies here, while a dry port facility to help with customs clearance has been established by Botswana Railways. The town also hosts the annual trade and cattle show.

MAUN

Situated in north-western Botswana at the lower end of the Okavango Delta, the once dusty, frontier town of Maun is today the country's main tourism capital as well as the administrative centre of the Ngamiland district. Well within the tropical zone with a generally warm to hot climate, its name is derived from the Basarwa word '*maung*', which means 'place of the short reeds'.

While Maun was established in 1915 as the tribal capital of the Batawana, it has residents of many other groups, such as the Ovaherero, whose distinctive national costumes add a note of colour to the town. Once a cattle ranching and hunting centre with a deservedly 'Wild West' reputation, development has been swift and far-reaching; by 2001 Maun was

Botswana's fifth-largest population centre with 43 776 inhabitants.

As the gateway to the Okavango Delta and Moremi Wildlife Reserve, Maun is the hub of the northern tourism industry. Most of the safari companies are based here, as are numerous air charter services. Due to the large tourist numbers, Maun also boasts Botswana's busiest airport – and one of the busiest in southern Africa – with flights from Gaborone, Victoria Falls, South Africa and Namibia landing regularly, and a constant flow of light aircraft charters to and from the various Delta camps.

Supplies of almost everything can be bought in Maun, which has a number of good shopping centres, hotels and lodges, as well as four-wheel-drive and car hire companies and filling stations. The Best Western Riley's Hotel set on the banks of the Thamalakane River is a popular stopover and has been an important landmark since the 1920s, when Charles 'Harry' de Beauvoir Riley first arrived here and established a bar that was to become a popular and lively meeting place.

Opened in 1996, Nhabe Museum is housed in a 1940s colonial style home, with its permanent exhibition reflecting the diversity of culture in the region, from fishing nets and Hambukushu baskets to stone tools and hunting rifles.

The multi-million pula Letsholathebe II Memorial Hospital was opened in Maun on 25 April 2009. Maun Abattoir, which has been closed for some time now, is to be sold to interested private investors. Other current developments include the construction of a new hotel.

PALAPYE

Palapye is located in Central Eastern Botswana on the main road between Gaborone and Francistown, and is a convenient stopover point along the north-south rail and road routes. By the time of the 2001 census, this swiftly growing village had a population approaching 30 000.

Well known for its vast coal supplies, Palapye is the site of the Morupule Colliery and coal-fired Power Station, Botswana's principal domestic source of electricity. The town also has a small airfield. The Botswana International University of Science and Technology (BIUST) is presently being built here, with the first phase of the project scheduled for completion in December 2010.

The glass manufacturing plant established here in 2009 is set to create over 300 jobs, while another plant manufacturing large-diameter steel pipes should generate at least 200 jobs on completion. Along with these other developments, a new hotel is being built in Palapye.

Once the capital of the Bamangwato people under Khama III, when it was known as Phalatswe, Palapye and its surrounding areas contain a fascinating archaeological heritage, with important sites to be found in the Tswapong and Dikalate hills.

MAHALAPYE

The urban village of Mahalapye lies just north of the Tropic of Capricorn, the southernmost latitude where the sun will appear directly overhead at midday. The village has a population of over 40 000 and is the site of the Botswana Railways headquarters. Some 45 kilometres west of the town lie the Shoshong Hills, where stone-walled ruins as well as mine workings dating back hundreds of years (some as far as the eighth century AD) may be found.

SEROWE

With over 42 000 inhabitants, this is the largest traditional village in Botswana and one of the largest in Africa. Serowe has been the capital of the Bangwato ethnic group since 1902, when the centre moved here from Old Palapye.

The village is the home of the Khama family, '*dikgosi*' (traditional leaders) of the Bangwato, which provided Botswana with its charismatic first president, Sir Seretse Khama. The founding father of the Bangwato, Khama III (or Khama the Great), was one of the three dikgosi who petitioned the British Government to establish the Bechuanaland Protectorate. He is buried on a hill overlooking the town, his grave marked by a bronze duiker, the sacred animal of the Bangwato. The peaceful family burial site is also the final resting place of Sir Seretse Khama.

There are several other features of interest in this historical settlement. Flat-topped Thathaganyana Hill in the centre of the village dates back to the eleventh century and still bears the remains of an early settlement. A large ceremonial '*kgotla*' (courtyard) has the rondavels of the chief and the most important families built around it.

At the foot of Thataganyane Hill lies the Khama III Memorial Museum, housed in the former residence of Tshekedi Khama, the second son of Khama III and also Sir Seretse Khama's paternal uncle. Said to have been built around 1910, the colonial-style 'Red House' – so called because of its red corrugated iron – was donated in 1984 by Tshekedi Khama's son, Leapeetswe Khama.

The museum is a community-based project aiming to preserve the pre-historical, historical and cultural heritage of the Bangwato and other past inhabitants of the Central District. Its main attractions are the personal effects of Khama III and a collection of insects from the African continent. There are a growing number of permanent displays, including a collection of snakes of Botswana.

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The Khama III Memorial Museum celebrated its Silver Jubilee during 2010.

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Serowe was also home to the internationally acclaimed writer Bessie Head, who wrote most of her novels and historical works about Serowe, or a fictitious village that greatly resembles it. Ms Head, who died in 1986, is buried in Serowe, and there is a permanent exhibition, which includes some of her personal items, at the Khama III Memorial Museum. There are plans to have her house proclaimed a cultural site.

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The presentation of the International Quality Summit Award for Quality took place on May 28, 2007, in New York. In this way the BID symbol known in 173 countries around the world and has created a firm ground for the implementation of an integral quality process through the technology and procedures of the Qc100 Total Quality Management.

The purpose of the 21st International Quality Summit Award Convention New York 2007 was to recognize the commitment to quality of awarded companies whose activities cover the top areas of industrial production and services. For E Jose Pricto, Executive of BID, "the awarded companies are symbols of commitment to leadership, technology and innovation which make them models for other companies of their sectors".

FOLLOW YELLOW BRICK ROAD

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Bontle Pottery in Serowe makes a distinctive range of pottery from the unique clay types found in the Central District, while Serowe Woodcarvers is famous for its carved walking sticks and figures made by local Basarwa carvers.

Swaneng Hill School, the site of the first experiment that eventually led to the Botswana Brigade movement, is situated near the village airstrip. The new Sekgoma Memorial Hospital is a state-of-the-art 300-bed facility complete with outpatient clinics, medical, surgical, gynaecological, paediatric, psychiatric, maternity and tuberculosis wards. A new aerodrome has been designed to replace the existing rural aerodromes at Serowe and Palapye.

The Sefalana sorghum mill produces sorghum, sorghum meal and soya based extruded products, malt and diastatic malt products.

MOLEPOLOLE

Known as the 'gateway to the Kgalagadi', Molepolole has been the capital of the Kweneng district in south-eastern Botswana since 1863. The settlement gained prominence in the second half of the nineteenth century due to its central position in the trans-Kgalagadi ivory and ostrich feather trade. Molepolole is the largest urban village in Botswana as well as being the country's third largest population centre, with a figure of 54 561 residents recorded in the 2001 census.

Named after the celebrated Bakwena ruler Kgosi Sechele I, the Kgosi Sechele I Museum is a community project aimed at preserving local history and culture. Displays of historical artefacts trace the history of the Bakwena, one of the main Tswana tribes, as well as colonial history. The Scottish Livingstone Hospital here was built in the 1930s by the London Missionary Society and the United Free Church of Scotland, and today offers a variety of specialist services.

KANYE

With many buildings dating from the 1800s, the historic town of Kanye is the oldest major centre in Botswana as well as being the capital of the Bangwaketse since 1853. Established as an important focal point in the trade of ivory and ostrich feathers in the 1860s and 1870s, today the town has a population of over 40 000.

Places of historical interest include the London Missionary Society church built in 1907 and house of Bathoen I, a prominent figure in the movement against colonial domination. Opened in 1999, the Kgosi Bathoen II Museum is housed in the old Kanye District Commissioner's house.

Kanye is in the vicinity of a small asbes-tos mine, and is known for being the first settlement in Botswana to provide public standpipes and develop irrigation schemes. The town is also the site of the well-known Dinkgwana Pottery workshop.

JWANENG

In the early 1970s there were a mere 60 dwellers in the region called Jwana, the site of the present-day Jwaneng, which was built to serve the diamond mine that opened in 1982. This area was surveyed in preparation for the building of a town in 1978 and, a year later, a township authority was appointed. Since then, growth has been rapid, and Jwaneng is today the site of one of the richest diamond mines in the world. Census results for 2001 put Jwaneng's population at 15 179.

Planned by Debswana in conjunction with the Botswana government through the Department of Town and Regional Planning, this is an open town in which free enterprise is encouraged. The town is a convenient stopover for tourists either visiting the western parts of the country or in transit to other southern African destinations using the Trans-Kgalagadi Highway. There is a small hotel, and recreation facilities include a golf club, tennis court, bowling green and swimming pool. Owned by Debswana, the 18-hole golf course is set among Kalahari bushveld and has well-tended greens and expansive fairways. Jwaneng also boasts one of the most sophisticated hospitals in the country.

ORAPA

The town of Orapa is synonymous with Botswana's lucrative diamond mining industry, as it is here that one of the world's richest diamond pipes was discovered in 1967, only a year after the country's independence. Located on two kimberlite pipes, the open pit Orapa Mine is today known as one of the biggest diamond mining projects in the world. Situated in Botswana's Central Kalahari region some 250 kilometres west of Francistown, this small yet well known mining town had a population of just 9 151 at the time of the 2001 census. The Serowe-Orapa road and its extension to Maun, links Orapa and Boteti with the south-east and north-west of Botswana through a multi-lane road network.

MOCHUDI

The picturesque village of Mochudi owes its name to the Bakwena Kgosi Motshodi, who was buried here some three centuries ago. Characterised by traditionally decorated walls and rondavels, the town's many interesting historical sites include the old Dutch Reformed Church and the Phuthadikobo Museum, which is set atop a hill commanding a scenic view of the surrounding area.

Formerly the Bakgatla National School, which was the largest building in the Protectorate until after World War II, Phuthadikobo Museum has an interesting range of artefacts and contains fascinating material on the history of the ox wagon and metalworking in the area, as well as a working traditional blacksmith's yard. There is also a craft shop and silkscreen printing workshop.

Developments in the past decade have been associated mainly with the provision of accommodation for those working in Gaborone, with census figures for 2001 estimating that some 36 962 people lived in Mochudi.

RAMOTSWA

Located to the south of Gaborone, Ramotswa is the traditional capital of the BaLete people who, unlike most of the Setswana speakers in Botswana, are believed to originate from the Nguni. They have lived so long among the Tswana, however, that they are indistinguishable from them in both language and custom. The first woman to serve as a paramount chief, Kgosi Mosadi Seboko, hails from Ramotswa, having represented her village at the House of Chiefs since 2000.

Ramotswa's flour mill was developed with the assistance of the BDC and is a major employer. The village also has a small engineering works specialising in the manufacture of steel furniture, trailers and metal products. The Bamalete Lutheran Hospital was established here by Lutheran missionaries in 1934.

A few kilometres to the south of Ramotswa in the satellite village of Otse is Moeding College, a secondary school built by the London Missionary Society in the early days before independence. Otse is also the site of the Camphill School Rankoromane, a school for mentally and physically handicapped children run by the Camphill Community Trust.

The Camphill Community Trust also operates a small factory, that produces handicrafts and simple but beautifully designed furniture, as well as Motse Wa Badiri, a centre for disabled adults offering vocational training, employment and, where necessary, accommodation and social support. The centre has six independent operations, comprising the Sorghum Mill, Kalahari Knitting Centre, Garden Centre, Greenblade Garden Services, Namune Pottery and Godisa Technologies Trust – a workshop that manufactures hearing aids.

KASANE

Situated where the Chobe and Zambezi rivers meet near the Zimbabwean border, Kasane is excellently placed for tourists, being in close proximity to the Victoria Falls, Chobe National Park and the northernmost border crossing between Botswana, Namibia, Zambia and Zimbabwe. Kasane International Airport is situated just four kilometres out of town and a short drive away from the falls. Kasane is used mainly by visitors en route to the many nearby attractions, and the town's strategic location has led to rapid expansion over the past few years.

The only wilderness destination in Botswana with a rich forest reserve, Kasane is close to the famous Chobe National Park, the second largest game reserve in the country and home to one of the largest elephant populations in the world. Kasane is also an excellent base from which to explore the Victoria Falls, Namibia's Caprivi Strip and wildlife areas beyond Chobe, such as the Savuti region and Moremi Game Reserve. Closer to town, there are hot springs, excellent fishing camps, sundowner river cruises and beautiful picnic sites near the Kasane Rapids.

The area offers a range of good accommodation, including upmarket hotels and safari lodges. Mowana Safari Lodge has a nine-hole golf course along the banks of the Chobe River. Plans to build a recreational park next to Mowana Lodge are at an advanced stage. The project will consist of a cultural village, curio shop and information desk, picnic sites and look-out points, nature trails with rest points and baptism pools.

GABANE

Lying some 20 kilometres from Gaborone, the village of Gabane is set against a backdrop of picturesque rocky cliffs, and offers an intriguing glimpse of life in rural Botswana. Gabane Pottery, which originally started operations as Pelegano Pottery, can be found beneath the hills surrounding the village. Here ceramic products such as candleholders, tableware and other household items are made from indigenous clays and decorated in traditional designs.

GHANZI

Known as the capital of the Kgalagadi, Ghanzi is situated in west-central Botswana, hundreds of kilometres away from any other major towns or settlements. Once home to the Basarwa, who perfected the art of survival in this harsh landscape, the area was settled by Afrikaner trekkers in the late 1890s, with a number of cattle ranches established in the early 1900s.

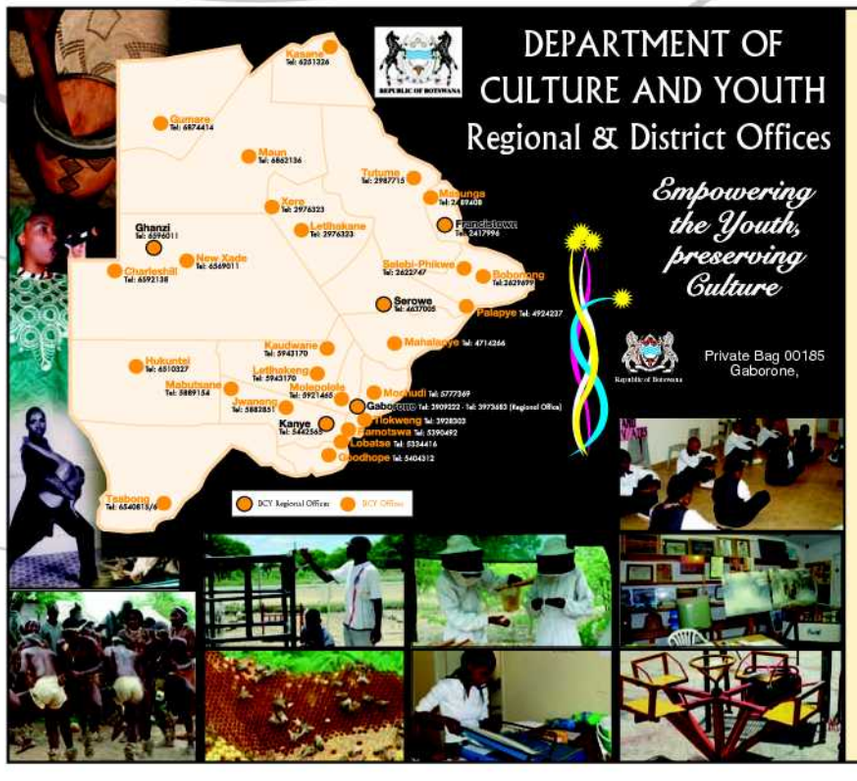
Today Ghanzi is made up of a variety of ethnic groups: Basarwa, Bakgalagadi, Baherero, Batswana and Afrikaners. Visitors will find some of the best Basarwa crafts in the country at Ghanzi Crafts and Kuru Development trust, such as woodcarvings and painted fabrics. The Kuru Dance Festival held around August every year is a showcase for traditional dance.

NATA

Located in a cattle-farming area, the small village of Nata lies at the crossroads of the north and west routes some 100 kilometres from Francistown, providing a convenient stopover for travellers, who can refuel their vehicles or spend the night en route to Chobe or the Okavango. Places well worth exploring in the vicinity include the Nata Bird Sanctuary as well as the nearby Sowa Pan and Eastern Ntwetwe Pan.

GUMARE

The small town of Gumare is situated to the west of the Okavango Delta and is home to one of the country's 14 primary hospitals. The towns of Gumare together with nearby Etsha, situated a little further north, produce most of Botswana's woven baskets, which are the area's main source of income.



VISION STATEMENT

We the department of culture and youth shall be a leading organisation in the promotion and preservation of national culture and youth development.

MISSION STATEMENT

We The Department Of Culture And Youth Exist To Promote And Preserve National Culture As Well As Ensure Youth Development And Empowerment.

VALUE STATEMENT

CUSTOMER CARE
We strive to provide our customers with excellent service and ensure that our processes minimize internal disgruntle-ments that may compromise the quality and speed of our service.

TRANSPARENCY
We ensure that our work procedures are clearly outlined and consistently adhered to.

STAKEHOLDER INVOLVEMENT
We fully embrace realistic participation of all stakeholders in our programming and our approach is responsive to the every changing customer needs.

HUMAN RESOURCE FOCUS
We are committed to developing the necessary competencies amongst our staff and guide our customers to appreciate and fully exploit their latent talents.

TEAM SPIRIT
We focus our efforts in developing a coherent team that continuously strives to surpass customers' expectations.

EFFECTIVE COMMUNICATION
We strive to timeously provide quality information and get constructive feedback that can assist in improving our service and public relations.

Running from 2009 until 2016, National Development Plan 10 (NDP 10) aims to accelerate diversification of the economy, from dependence on diamonds towards growth of the rest of the private sector. Institutions continue to be restructured to better deal with global competition, sustain future economic growth and render the economy more resilient to external shocks.

Botswana's government, together with the private sector and development partners, continues its efforts to expand foreign trade, diversify the export base, improve productivity and productive technologies, make the economy more competitive and attract additional foreign direct investment (FDI).

FOREIGN TRADE AND INVESTMENT



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BDC's commitment to the diversification of Botswana's economy is central to the Industry Division's operations. Through the Corporation's research efforts, opportunities for investment continue to be identified, including;

- food cans manufacturing
- tableware and sanitary ware manufacturing
- float glass manufacturing
- components assembly for various items, such as telephones, personal computers
- packaging/bulk breaking of perishable items, most of which are currently imported from neighbouring countries
- manufacturing of pharmaceuticals, jewellery and leather goods

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As a landlocked country, Botswana has high transport costs for imports and exports of merchandise (and for some service exports such as tourism). The partial exceptions are merchandise trade with neighbouring countries and exports of high-value and low-bulk goods, such as diamonds. In addition, the country has a small population and market base, and shortages of skilled labour.

For these reasons, NDP 10 focuses on promoting the export of those goods and services that are least dependent on the country's transport infrastructure and use as little skilled labour as possible. The Trade Development and Promotion programme is aimed at improving export production capacity and diversification, removing supply side constraints at firm level, and simplifying, harmonising, standardising and modernising trade procedures and cross-border operations.

Botswana is fortunate in having as a neighbour the much larger economy of South Africa. This reduces the disadvantage of being landlocked in that it can export to South Africa at relatively low transport costs. A further advantage is that Botswana's economy is small in relation to that of South Africa, and thus exports to that country tend not to give rise to protectionist measures from South African producers. Botswana's exports to South Africa have grown consistently: the trend rate of growth from 2001 to 2008 was 23.6 percent in current prices, and thus well above average inflation of 8.4 percent in those years.

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Botswana's small domestic market has resulted in the promotion of export-led industries.

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NDP 10 emphasises that every opportunity to export to neighbouring markets must be exploited, with complementary infrastructure to be built and properly maintained, and diplomacy directed to maximising regional trade. In the area of international trade, efforts are being made to reduce the regulatory and protectionist barriers to trade.

FDI is focused on technology and skills transfer and access to markets rather than simply attracting capital inflows. NDP 10 further acknowledges the need to reduce regulatory constraints on the private sector in order to encourage investment and to improve Botswana's ratings in international comparisons of the investment climate.

THE INVESTMENT CLIMATE

Botswana has one of the most favourable investment environments in Africa, with an extremely good record of macroeconomic stability and GDP growth, which was for 30 years the highest in the world. While economic growth has slowed in recent years, it has remained positive except for 2008/09, and has been almost always greater than the rate of population growth. That Botswana's economy rebounded after the global financial crisis is primarily because it engaged this difficult period from a position of considerable strength and had sufficient financial resources to enable it to cope with an exogenous shock.

The country is a regional leader in economic freedom. The Heritage Foundation's 2010 Index of Economic Freedom ranks Botswana 2nd out of 46 countries in Sub-Saharan Africa and 28th in the world, with an overall score well above regional and world averages. The World Bank in its 2010 'Doing Business' report puts Botswana in 45th place (from 51st in 2008), while the World Economic Forum's 2009/10 Global Competitiveness Index ranks Botswana 66th out of 133 countries worldwide and third in Africa after Tunisia and South Africa.

Botswana has a generally peaceful environment, with low levels of crime and corruption. It is ranked 37th out of 180 countries in Transparency International's Corruption Perceptions Index for 2009 and is rated Africa's least corrupt nation. It is ahead of many European and Asian countries and has a proven record of honest economic governance.

The overall freedom to establish and run a business is relatively well protected under Botswana's regulatory environment. Government has established a one-stop shop for investors, and the process for closing a business is easy and straightforward.

While generally open to foreign participation in its economy, Botswana reserves a number of sectors for citizen participation. Increased foreign investment plays a significant role in the privatisation of state-owned enterprises. Investment regulations are transparent, and bureaucratic procedures are streamlined and open. Investment returns such as profits and dividends, debt service, capital gains, returns on intellectual property, royalties, franchise fees and service fees can be repatriated without limits. Foreign exchange is not difficult to obtain, and there are no restrictions on foreign exchange accounts or international transfers. The country has prioritised enhanced business profitability and regional competitiveness with a more efficient investment code.

Botswana's competitive banking system is one of Africa's most advanced, and commercial banks here remained relatively untroubled by the global banking crisis. Generally adhering to global standards in the transparency of financial policies and banking supervision, the financial sector provides ample access to credit for entrepreneurs. Credit is allocated on market terms, although the government provides subsidised loans. Reform of non-bank financial institutions has continued in recent years, notably through the establishment of a single financial regulatory agency. Exchange controls have been abolished and, with the resulting creation of new portfolio investment options, the Botswana Stock Exchange is growing.

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With significant natural resources and a market-oriented economy that encourages private enterprise, Botswana has Africa's highest sovereign credit rating.

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The constitution prohibits the nationalisation of private property and provides for an independent judiciary, and the government respects this in practice. The legal system is sufficient to conduct secure commercial dealings, and the protection of intellectual property rights has improved significantly.

REPUBLIC OF BOTSWANA

Ministry of Foreign Affairs & International Co-Operation



The Minister of Foreign Affairs and International Cooperation,
The Honourable Mr. Phandu Skelemani

The Ministry of Foreign Affairs and International Cooperation is charged with the responsibility of implementing Botswana's foreign policy and guiding Government in the conduct of our foreign relations.

Foreign policy is sometimes described as the extension of domestic policy into the world stage. It is, in other words, the pursuit of National Interest of a state vis-à-vis other states and international entities.

Botswana gained her Independence in 1966 and at that time was a poor country which depended on grant-aid from the UK for over 50% of the Government revenues. The country had virtually no infrastructure and was prone to prolonged spells of drought.

Because of the prevailing regional and international situation, i.e. the polarized nature of international politics and diplomacy, Botswana, like other Third World countries, carved an independent and neutral position for herself and joined the Non-Aligned Movement (NAM). Botswana's foreign policy was influenced by the orientation of this group, and other organizations that she joined such as the Organization of African Unity (OAU), the Commonwealth and the United Nations Organisation.

In the later years, particularly the mid 1970's and early 1980's the situation in Southern Africa improved. The 1990's brought about even better opportunities. Botswana's foreign policy subsequently shifted beyond its preoccupation with survival politics and is now largely guided by our national policy objectives and priorities, which include:

- Promotion of peace, stability and democracy
- Economic diversification
- Poverty alleviation
- Employment creation
- Income generation
- Vision 2016

It is also guided by the following principles of the UN Charter and the Constitutive Act of the African Union:

- Cultivation of friendly relations with other countries and the international community in general;
- Peaceful resolution of conflicts;
- Respect for the sovereignty and territorial integrity of other countries; and
- Support for causes of common good.

Cultivation of friendly relations enhances our ability to live as a safe and secure nation. Peaceful resolution of conflicts is in line with our peaceful and democratic tradition and is consistent with our adages such as: *Ntwa kgolo keya molomo*, and *Mmualebe o bua la gagwe*.

Botswana believes in the sovereign equality of all nations – rich or poor, big or small, powerful or weak, and strongly believes that the world must be at peace with itself, which is a requisite for sustainable development.

Our support for causes of common good is part of our humble contribution to making the world a safer place to live in through our modest contributions to international humanitarian or disaster relief initiatives, participation in peace-keeping missions, including mediation efforts and in electoral observer missions.

The Ministry of Foreign Affairs and International Cooperation conducts its work through a network of diplomatic missions (Embassies / High Commissions) around the world. Currently Botswana has 19 diplomatic missions which serve as our outposts / stations abroad that promote and protect our national interests.

These interests include opportunities for exchange programmes, cultural cooperation, trade, investment and tourism. Missions also provide welfare services for Batswana abroad and facilitate communication between the Government of Botswana and the international community.

Botswana's Missions can be contacted at:

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Botswana is ranked second only to South Africa among sub-Saharan Africa countries in the 2009 International Property Rights Index.

Tax rates remain among the lowest in Southern Africa. Both the top income tax rate and the top corporate tax rate are 25 percent. Other taxes include a value-added tax (VAT), a property tax and an inheritance tax. A special rate of 15 percent remains available for all companies operating within the jurisdiction of the Botswana International Financial Services Centre, which also attracts a number of other tax benefits. In the most recent year, overall tax revenue as a percentage of GDP was 36.6 percent.

As regards trade, Botswana's weighted average tariff rate was 8 percent in 2008. There are very few non-tariff barriers, but import bans and restrictions on some products, import taxes, import licensing and domestic bias in government procurement add to the cost of trade.

Botswana's employment regulations are relatively flexible, and the non-salary cost of employing a worker is very low. Employers are not required to make pension, health insurance and unemployment insurance contributions.

Although labour productivity and total factor productivity are not the highest in the region, median monthly wages are lower than in Namibia and Swaziland, and very substantially lower than in South Africa. As a result, unit labour costs in Botswana are approximately the same as those in Namibia and Swaziland, and substantially lower than in Lesotho (about 60 percent) and South Africa (about 67 percent). This puts Botswana is in a relatively sound competitive position in relation to other SACU member states.

Investment opportunities

A wide variety of raw materials is available locally, such as soda ash, beef and beef by-products, coal, diamonds and other minerals. There is scope for further investment in the manufacturing of leather goods and canned beef products, glass products, textiles and the polishing of diamonds and semi-precious stones. As regards service sectors, areas for investment include data processing, ICT, financial services and tourism.

In terms of the National Export Strategy, key priority sectors include meat and leather products, creative industries (arts and crafts), gems and jewellery, chemicals and ICT. The introduction of new production techniques and transfer of technology are important considerations, with government actively encouraging joint ventures between citizen entrepreneurs and foreign investors.

ATTRACTING ADDITIONAL INVESTMENT

Investment, as measured by Gross Fixed Capital Formation, declined in real terms in the first half of NDP 9. It is critical that this trend be reversed, and the required FDI generated to achieve the desired GDP growth rate during NDP 10 and beyond. The aim is to increase levels of FDI inflows and to increase investment in expansion of existing business operations from P150 million to P800 million by the end of NDP 10.

Increased regional political and macro-economic stability means that Botswana can no longer rely on these traditional strengths to attract FDI. Activities in the Investment Promotion Programme include the development of an investment master plan, preparation of investment demand studies and associated sector investment strategies, the establishment of special economic zones, and after-care services for investors. Specific economic growth areas have been identified to serve as magnets for FDI, and major development projects have been grouped into six hubs: diamonds, transport, agriculture, health, education and innovation.

One of the prime areas receiving attention is the regulatory environment. While it is much easier to start a business in Botswana than it was four years ago (with the country moving from 102nd place in 2006 to 83rd in 2010 in the 'Doing Business' report), there are still ten procedures, requiring 61 days. There is an urgent need, therefore, to reduce the number of procedures and make them simpler. Towards the end of NDP 9, the turnaround time for the incorporation of companies and the registration of businesses was reduced to an average of five working days.

The review of the Industrial Development Policy of 1998 and the Industrial Development Act of 2006 should simplify the business licensing process and the registration of micro businesses. Following the launch of the Copyright and Neighbouring Rights Act in June 2008, a copyright office has been established and the Copyright Society of Botswana registered. Government is also developing a Competition Law, which will help curb unfair and restrictive business practices.

Business development tends to be constrained by the shortage of skilled labour as well as the difficulty in acquiring work and residence permits for non-citizen employees. This underlines the importance of making the recruitment of foreign skills as straight-forward as possible. Computerisation of systems has greatly reduced delays in obtaining visas (seven days) as well as residence and work permits (a maximum of three weeks), and requirements for work permits, permanent residence and citizenship continue to be reviewed. The ongoing drafting of bills to amend the Immigration and Citizenship Act and the Employment of Non-Citizens Act should further improve Botswana's skills base.

The creation of free economic zones – also known as Special Economic Zones (SEZ) – is planned in order to develop viable new business activities. These zones will provide attractive incentives (related to tax, labour, land and telecommunications costs) for specific investment ventures in areas such as ICT, bio-technology and specialist medical fields as well as diamond polishing and jewellery making. A draft policy and model law have been created.

Additional information on policy and regulatory developments to facilitate investment in Botswana is available in the '*Commerce & Industry*' chapter.

TRADE AGREEMENTS

Promoting regional and international trade is

critical in the diversification of the economic base and the transformation of the economy to high income status, and trade arrangements are undertaken to expand market access for goods and services.

Agreements under the ***World Trade Organisation (WTO)*** cover merchandise trade as well as trade in services and intellectual property rights. As a WTO member, Botswana is committed to the implementation of WTO agreements, including the progressive liberalisation of trade. Current negotiations focus on reaching agreement on modalities for agriculture and non-agricultural market access, with Botswana seeking to ensure that these will support industrial development, protect sensitive industries and ensure food security.

Along with South Africa, Lesotho, Namibia and Swaziland, Botswana is a member of the ***Southern African Customs Union (SACU)***, the regional framework for trade cooperation. Its products therefore enjoy duty free access to a market of more than 55 million consumers with a combined GDP of US $307 billion. Beyond being a customs union, SACU's aims are to advance the economic development of its member countries, to diversify their economies and to afford all parties equitable benefits arising from intra-union and international trade.

Institutions are currently being established to facilitate a more democratic decision making and management process in SACU, and Botswana produced the first draft of the 'Directorate of International Trade Administration Bill' in 2009. Work on harmonisation of industrial policies and cooperation on competition policies has commenced. A national body for tariff administration within SACU is expected to be in place by October 2010.

Countries in the common customs area are able to negotiate new Free Trade Area (FTA) agreements with third parties as a bloc. Together with other SACU members, Botswana has concluded an FTA agreement with the European Free Trade Association (EFTA) states (Switzerland, Norway, Iceland and Lichtenstein) and a Preferential Trade Agreement (PTA) with the Common Market of the Southern Cone (MERCOSUR), comprising Argentina, Brazil, Uruguay and Paraguay.

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Exports from Botswana to the MERCOSUR region grew by 56 percent from 2006 to 2007, and by 75 percent from 2007 to 2008, and exports should grow further following the implementation of the Preferential Trade Agreement.

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The SACU-US Trade and Investment Development Cooperation Agreement (TIDCA) was signed in July 2008. The agreement provides for cooperation between SACU and the United States with a view to negotiating a future FTA. Botswana is currently the US's 132nd largest goods trading partner, with US $281 million in total (two-way) goods trade during 2008. Botswana's exports to the US totalled US $219 million in 2008, making it the US's 112th largest supplier in this period. The largest export categories were: diamonds (US $201 million), knit apparel (US $13 million) and woven apparel (US $2 million).

Negotiations for a PTA between SACU and India were launched in 2007. To date, three rounds of negotiations have been conducted, resulting in the signing of a Memorandum of Understanding in November 2008.

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Negotiations are also in the offing between SACU and the East African Community (EAC), as well as between SACU and China.

Botswana is a member of the ***Southern African Development Community (SADC)***, a grouping of 15 countries with a combined population of some 257.7 million and a cumulative GDP of US $471.1 billion. Other members of SADC include South Africa, Zimbabwe, Zambia, Malawi, Madagascar, Tanzania, Mauritius, Seychelles, Angola, Democratic Republic of Congo, Namibia, Lesotho, Swaziland and Mozambique. The principal aim of SADC is to coordinate and harmonise the socioeconomic policies and plans of its member states in order to ensure sustainable economic development and growth in the southern African region.

SADC launched an FTA in 2008 involving zero tariff levels for 85 percent of all goods traded among member states. Liberalisation of tariffs on the remaining 15 percent of goods, considered to be sensitive products, is expected to be completed in 2012. The principal benefit to Botswana is trade in agricultural goods. Botswana already has free trade with South Africa, whose GDP is about 75 percent of total SADC GDP, and the main impact of the FTA will be on the country's trade with Zambia, particularly if transport links are improved.

The FTA is one of the first milestones of the SADC Regional Indicative Strategic Development Plan towards regional integration, and is to be followed by a Customs Union, Common Market and Monetary Union. At present, further consolidation of the FTA is taking place to address outstanding tariff phase down obligations, rules of origin, tariff lines and non-tariff barriers.

Provisions under the Cotonou Agreement for trade between the EU and African, Caribbean and Pacific (ACP) countries came to an end on 31 December 2007. The subsequent Interim Economic Partnership Agreement (IEPA) that was signed during June 2009 replaces the Goods Chapter of the Cotonou Agreement and ensures unhindered market access for existing export products to the EU, as well as more flexible rules of origin. However, as some 94 percent of EU imports from Botswana comprise diamonds and nickel, which are already duty-free, the IEPA's main significance is for Botswana's beef industry.

Botswana and other SADC member states which initialled the IEPA have begun negotiations on trade in services and investment that will lead to a full EPA. These negotiations have a development component through which assistance would be provided to Botswana during the 10th European Development Fund (EDF 10), covering the period 2008-2013. Projects identified in the EPA negotiations are implementation focused, and include capacity building support for trade facilitation, standards, trade defence mechanisms, rules of origin and private sector support.

Botswana is eligible for trade benefits under the ***African Growth and Opportunity Act (AGOA)***. In 2004, the US government extended AGOA to 2015 through the African Growth and Opportunity Acceleration Act (AGOA III). Likewise, the Least Developed Country (LDC) provisions that allow Botswana to utilise third country fabrics were extended, but only to 2012. The total cumulative value of exports under AGOA from 2003 to 2008 was approximately US $364.8 million.

TRADE & EXPORT FACILITATORS

The implementation of the National Export Strategy, National Trade Policy and Investment Strategy is expected to start during the 2010/11 financial year. The National Trade Policy provides a framework for achieving the broadest possible free and reliable access to markets for Botswana's exports, while enabling producers and consumers to have access to the widest possible choice of international goods and services on the best possible terms.

The ***Department of International Trade (DIT)*** was established in 2003, and has a staff complement of 71 officers. It continues to build capacity to address international trade issues, including trade negotiations and implementation of trade agreements, trade policy analysis and export development. In addition, a fulltime Chief Negotiator commenced work in January 2007.

Consisting of relevant government departments, the private sector and other stakeholders, the ***National Committee on Trade Policy and Negotiations (NCTPN)*** was established in 2004, and is supported by twelve technical committees on trade and trade-related areas. The DIT serves as the Secretariat to NCTPN. The objectives of the NCTPN and its technical committees are to provide advice on trade policy issues and national negotiating positions developed by the DIT.

The ***Southern African Global Competitiveness Hub*** in Gaborone was established in 2002 by the United States Agency for International Development (USAID). The trade hub provides technical assistance to southern African governments, the private sector and regional organisations, with a view to enhancing the utilisation of AGOA and promoting the Trade for Africa's Development and Enterprise (TRADE) initiative. The two current technical activity areas comprise the Trade Facilitation and Capacity Building (TFCB) and the Trade Competitiveness (TC) projects, both of which began in October 2004. These projects focus on specific elements of the Africa Global Competitiveness Initiative (AGCI), which for 2010 include:

- Trade and Investment Enabling Environment
- Private Sector Competitiveness
- Financial Services
- Modern Energy Services
- Agriculture Enabling Environment

The ***Botswana Bureau of Standards (BOBS)*** is tasked with establishing national standards and promoting and facilitating their implementation in industry and commerce, with a view to improving competitiveness and efficiency of industry and enhancing trade for the benefit and protection of consumers. BOBS offers technical services in the areas of standardisation, testing of goods, certification of products, industrial and trade metrology, quality management systems, environmental management systems, information and training.

Since its establishment in 1997, BOBS has grown rapidly. The number of technicians and scientists has grown from 13 in 1997 to 127 in March 2009. Over 500 national standards have been developed, 33 companies have been awarded ISO 9001:2000 certificates for their compliance with the internationally recognised quality management system standard, 15 companies have been awarded

29 BOBS Standards Marks for compliance to the Botswana standards, and 2 215 people have been trained in standards and the management system.

During NDP 10, BOBS is to diversify and expand services offered to local companies, especially those that are export-oriented. Planned initiatives include innovation and technology to enhance BOBS's capacity to print standards in-house and online; establishment of a dedicated equipment maintenance facility; and undertaking research studies, which will see a review of the Standards Act and policy reform for compulsory standards, and development of a national quality policy.

Administered by the Botswana Institute for Development Policy Analysis (BIDPA), which has been instrumental in the creation of both the National Trade Policy and National Export Strategy, the ***Southern African Trade Research Network (SATRN)*** is involved in strengthening the SADC region's ability to address major policy issues that foster regional economic integration as well as to build the region's capacity to participate in global fora such as the WTO. SATRN currently receives co-funding from the IDRC, and also receives event-specific funding from the World Bank, UNDP, UNDESA and USAID/RCSA.

A 100 percent subsidiary of the Botswana Development Corporation (BDC), the ***Botswana Export Credit Insurance and Guarantee Company (BECI)*** was set up to provide export credit insurance, which consists of both commercial and sovereign risk cover. Government's direct involvement in this endeavour is in offering the political risk reinsurance to cover the sovereign risk in the importing countries. The company also covers credit sales made in the local market and other related products, such as construction guarantees and related guarantees.

Exporters' Association of Botswana (EAOB) is a non-governmental trade organisation registered under the Botswana Registrar of Societies Act to facilitate global trade and enhance economic growth and diversification from traditional exports to non-traditional exports (manufactured goods and services). EAOB endeavours to increase production of export related products by providing specialised services, identifying foreign markets for locally produced exportable merchandise, and making representation to government on behalf of the export community. An Export House handles small business exports and raw material imports.

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The Botswana Brand initiative – with the tagline 'opportunity and tranquility beckon' – has created a distinct and positive image for Botswana, and is being implemented by the Ministry of Trade and Industry in collaboration with BEDIA.

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The ***Botswana Export Development and Investment Authority (BEDIA)*** is a parastatal mandated to encourage, promote and facilitate the establishment of export-oriented enterprises, with a special emphasis on attracting foreign investors, and transform Botswana into a destination of choice for doing business. BEDIA operates a One-Stop Service Centre (OSSC), which liaises with both government and parastatal bodies to help investors secure the necessary clearances to operate a business in Botswana.

Since its inception in 1997, BEDIA has generated investments totalling P565 million (both new investments and expansions of existing operations), which resulted in the creation of 9 314 jobs. Investment worth P521 million was generated during the NDP 9 period, resulting in the creation of 6 744 jobs.

BEDIA supports businesses and investors by identifying investment opportunities in the country and export markets for local products, providing investment advice, identifying joint venture partners, and organising visits and meetings between economic operators and potential investors. It assists private businesses to obtain factory shells, complete pre-investment clearances, such as work and residence permits, and acquire licences, as well as providing economic data such as trade statistics. Both inward and outward investment missions are organised to familiarise potential investors with the investment climate in the country, as well as fairs, exhibitions and contact missions to market Botswana's products abroad.

In addition to general investment promotion activities, BEDIA's focus has shifted to encompass investor targeting, which seeks to match investors with specific investment opportunities. Particular attention is given to resource-based industries, such as leather, beef and glass, which add value to locally available raw materials.

In October 2006, BEDIA embarked on an Export Development Programme with a view to building the capacity of local firms to compete in regional and international markets. A total of 12 companies from the crafts, pottery and leather industries successfully completed training in June 2009. It is expected that at least 15 companies will graduate from the programme annually.

Projects planned for NDP 10 include a feasibility study on the establishment of a jewellery park; integrated beneficiation processes in the diamond, copper and gold industries; a study on commercial agriculture to encourage adding value to local natural resources; construction of additional factory shells in Francistown and Gaborone; development of an Investment Master Plan; and sectoral studies for the establishment of special economic zones.

Further information on the abovementioned bodies, as well as other business associations and commercial, industrial and manufacturing development organisations can be found under the '*Commerce & Industry*' and '*Banking & Financial Services*' chapters.

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IFSC-BEDIA MERGER

The Botswana Export Development and Investment Authority (BEDIA) is being merged with the International Financial Services Centre (IFSC), as the two entities are both involved in investment promotion and branding. This will not affect current IFSC tax incentives and services.

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Because of the small size of Botswana's economy, diversification has required import substitution on the one hand and the development of increased non-diamond exports on the other hand. Diversification is necessary in order to minimise the risk of being dependent on a few major export commodities and to cut back on the dependence on imports that characterised Botswana at Independence, even though the latter has been much reduced.

Greater productivity and competitiveness in Botswana's enterprises is crucial for further economic growth, particularly in the aftermath of the global recession and in view of the predicted decline in mineral revenues over the long term.

COMMERCE AND INDUSTRY

BOTSWANA



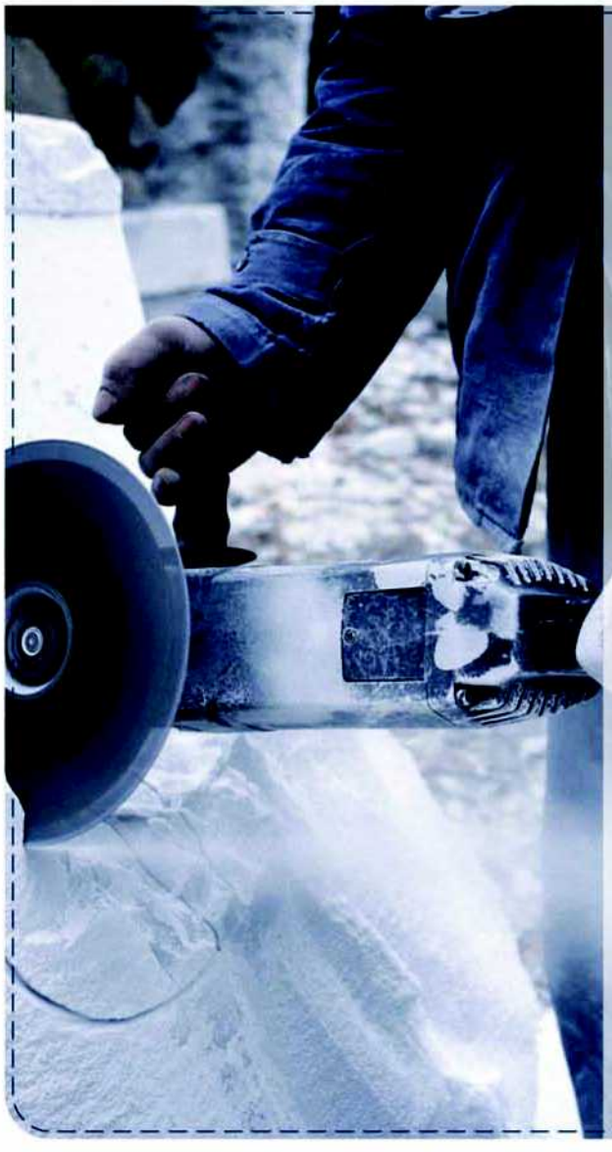
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The present National Development Plan, NDP 10, represents a watershed in terms of transforming the economy from one that is led by the public sector to one that is led by the private sector. Government's mandate is to provide an enabling environment for investment, business growth and economic diversification. This includes developing private sector capacity, expanding market access for locally produced goods and services, and strengthening fair trade and business practices.

Despite the small size of Botswana's local market, it is the second-biggest customer in the region after South Africa, importing P27.4 billion worth of goods and services in 2007 and P38.4 billion in 2008. Under NDP 10, all major projects – public and private – will be unbundled and analysed to ascertain their potential to generate beneficiation, sub-contract work, maintenance and outsourcing opportunities.

Projects for possible execution through Public-Private Partnership (PPP) will be identified, and all projected public and major private sector imports will be aggregated and their potential to create local, sustainable supply enterprises assessed. A focal point for the receipt of new private sector project proposals will be set up as a cross-sectoral network for the review and fast-tracking of the implementation, monitoring and evaluation of accepted projects.

PRIVATE SECTOR GROWTH

A strong, dynamic, outward-looking, efficient and internationally competitive private sector is crucial for the future long-term rapid economic growth of Botswana. As such, the removal of all existing administrative, bureaucratic and regulatory impediments to investment, private sector development and exports are being removed or minimised, and the participation of local enterprises in the economy and the international market increased through enhancing capacity and creating opportunities for developing local entrepreneurs. During NDP 10, a multi-pronged strategy will be pursued, aimed at supporting complementary efforts by government and the private sector.

Private sector led growth will require structural reforms to encourage entrepreneurship and investment, with the focus on cross-cutting reforms that are able to benefit the whole economy. Current investments in power generation will address a key bottleneck to growth. With appropriate safeguards, plans to privatise selected parastatal organisations, greater use of PPPs and the rationalisation of commercial services currently provided by the government could also mobilise greater private sector participation in the economy.

While the outlook for future growth is fairly positive, the broad stimulus budget of 2010, which was used to bolster the non-mining sector, is not sustainable in the medium to long term. There is consequently a need to refocus efforts on aggressively pursuing diversification strategies. The Botswana Excellence Strategy for Economic Diversification and Growth has as a key component the identification of specific economic growth areas which can serve as magnets for investment. Major development projects have thus been grouped into six hubs; namely the diamond, transport, agriculture, health, education and innovation hubs.

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The Private Sector Development Strategy for NDP 10 entails creating a private sector-enabling and supportive policy environment, stimulating increased investment flows and enhancing the competitiveness of the private sector.

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ENABLING INSTITUTIONS

The Ministry of Trade and Industry (MTI) is divided into two sections – The Trade Division and the Industry Division, and comprises six departments and three semi-autonomous parastatals. The departments are: Trade and Consumer Affairs, Cooperative Development, International Trade, Registrar of Companies and Intellectual Properties, Industrial Affairs and Corporate Services. The parastatals are: Botswana Export Development and Investment Authority (BEDIA), Botswana Bureau of Standards (BOBS) and the Local Enterprise Authority (LEA). There are also a number of statutory boards which, while reporting directly to MTI, are autonomous in their operational responsibilities.

The ***Botswana Development Corporation (BDC)*** assists in the establishment and development of commercially viable businesses in Botswana through equity participation, loan financing, guarantees and provision of factory space. The Industry Division identifies new industrial manufacturing projects and appraises business proposals for both new and expanding projects – in particular those which use locally available resources, produce goods for export or import substitution, foster linkages with local industry, and contribute to the development of Botswana's resources and overall economy. Furthermore, the corporation supports projects that generate sustainable employment for Batswana, add to the skills of the local workforce, and encourage and support citizen participation in business ventures.

The BDC has a diverse portfolio, covering industry, agribusiness, services, property development and management. Through its subsidiaries, affiliates and associate companies, BDC has been active in the local production of products which were previously imported.

The ***Botswana Innovation Hub (BIH)*** is a Science and Technology Park aiming to connect high-technology innovators, market experts and capital providers to tranform ideas into viable business

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The ***Botswana Institute for Development Policy Analysis (BIDPA)*** is a non-governmental research organisation which works to promote policy analysis through research, capacity building, assisting organisations or individuals where appropriate, monitoring the country's economic performance and disseminating policy research results.

The southern African regional office of the ***Centre for Development of Enterprise (CDE)***, whose mission is to support the implementation of private sector development strategies by providing non-financial services to ACP member countries, is located within the offices of the Botswana Export Development and Investment Authority (BEDIA).

The ***Botswana Confederation of Commerce, Industry and Manpower (BOCCIM)*** is an independent national body which represents the interests of employers in all sectors of the economy. As the main voice of the private sector in Botswana, it offers business management advisory services, training of employers and their employees, industrial relations and economic policy advocacy, business networking and business/economic information dissemination, and organises trade and investment missions abroad.

Acting as the voice of small and medium business to government, the ***Botswana Chamber of Commerce and Industry*** co-ordinates local autonomous chambers that work closely with local authorities.

Other enabling institutions, such as the Botswana Export Development and Investment Authority (BEDIA), Botswana Bureau of Standards (BOBS) and Southern African Global Competitiveness Hub, feature in the '*Foreign Trade & Investment*' chapter. The Citizen Entrepreneurial Development Agency (CEDA) is discussed later in this chapter.

Public Procurement and Asset Disposal Board

The Public Procurement and Asset Disposal Board (PPADB) was established in 2002 in order to prudentially manage the procurement system for central government as well as to adjudicate and award tenders by ensuring compliance with the PPAD Act in the acquisition of public assets. The seven-member board ensures that the fundamentals of value for money, transparency, fair competition, integrity, accountability, and an absence of corruption among contractors, suppliers and service providers, are observed.

The board's core functions and responsibilities include registering contractors and ensuring that the Code of Conduct is observed. The board registers limited services, such as works, aspects of ICT and manufacturers of medical reagents to facilitate the implementation of government policies meant to promote citizen economic empowerment. An appropriately contrived registration system for larger supplies and services related contractors is being developed. It is envisaged that gradual devolution will see the PPADB assuming a more regulatory responsibility and monitoring function in the awarding and implementation of government contracts.

PPADB is presently implementing its five-year strategic plan, covering the period 2008-2013, with the following objectives:

- Vision: To be the centre of excellence for public procurement and asset disposal by 2018.
- Mission: To lead the effective implementation of devolved, efficient, cost-effective and transparent public procurement and asset disposal through an appropriate regulatory environment.
- Values: Fairness and equity, integrity, customer service, partnerships, communication.

POLICIES & LEGISLATION

Government continues to undertake comprehensive reviews and develop new policies, legislation and regulations with a view to creating a business-friendly environment able to attract additional domestic and foreign investment.

The new ***Companies Act*** (No. 32 of 2004), which came into force in July 2007, has seen the introduction of simplified procedures for the incorporation of companies. Towards the end of NDP 9, the turnaround time for the incorporation of companies and the registration of businesses, upon receipt of an error-free application, was reduced from three months to an average of five working days. Further computerisation of systems will improve this turnaround time.

A ***National Cooperative Policy*** has been developed which seeks to guide cooperatives on initiating economically viable and sustainable enterprises.

The ***Competition Policy***, which aims at enhancing competition in the market place by reducing or eliminating anti-competitive and restrictive business practices, was approved in 2005. A Competition Law, which will establish a Competition Authority, has been drafted, and the Competition Bill has been approved.

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ONLINE REGISTRATION

The computerisation of company incorporation, business names registration and patents in the Trademarks Registry was finalised in March 2008, and provides for online registration of companies, business names and trademarks.

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Approved in 2002, the ***Gaming and Gambling Policy*** provides for a comprehensive review and consolidation of the Casino Act and the Lotteries and Betting Act in order to facilitate the responsible and orderly development of the industry. The ***Gaming and Gambling Bill*** and its implementing regulations are currently being drafted, a self-financing and autonomous Gambling Authority set up, and a Gaming and Gambling Plan developed to determine the locations and number of gambling facilities to be established.

The Industrial Property (Amendment) Bill to amend the ***Industrial Property Act*** was submitted and approved by cabinet in 2009. The act is being reviewed to ensure that it fully complies with the intellectual property international treaties and conventions, including the Trade Related Intellectual Property Rights (TRIPS) agreement.

The ***Industrial Development Policy*** of 1998 is under review to keep pace with industrial developments around the world and ensure an attractive environment for investment. The

Facilitating business networks

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Blue Jacket Square
Private Bag F/85, Francistown
Phone: 2414622, Fax: 2414494
Email: boccimft@boccim.co.bw

Industrial Development Act of 2006, which is presently being reviewed, provides for service delivery improvement by reducing the time taken to issue manufacturing licences from one month to one week, and for the issuance of manufacturing licenses for an indefinite period, subject to payment of an annual fee. While licensing of large-scale manufacturing enterprises remains under MTI, licensing of manufacturing SMMEs has been decentralising to local authorities. The act also provides for joint venture arrangements between wholly citizen-owned small and medium scale enterprises (SMEs) and non-citizens, provided citizens retain a minimum shareholding of 51 percent.

The review of the Trade and Liquor Act saw the creation of two new pieces of legislation: the *Trade Act* (2003), which provides for simpler licensing procedures to reduce the time and cost of obtaining a licence; and the *Liquor Act* (2003), which provides for stringent regulations regarding the proliferation of outlets, liquor trading hours and liquor applications. However, since the implementation of these acts in 2008, a number of loopholes have been identified. The acts are thus being reviewed and a monitoring section is being established during the 2010/11 financial year to ensure their enforcement.

The *Copyright and Neighbouring Rights Act* was amended during NDP 9 to protect the copyright of artists, including musicians, poets, writers and architects, against piracy and infringements. A hologram security device will be used to distinguish authentic works from pirated works. The act also provides for the establishment of a Collecting Society responsible for collecting and distributing royalties to its members. A Copyright Office has been established and a Copyright Administrator appointed. Arrangements are ongoing for the establishment of a levy to be imposed on all imported and locally manufactured equipment capable of copying protected works. This levy will be used to develop and compensate right holders.

The *Consumer Protection Act* is currently being reviewed. Amendments will include, among others, the issue of consumer groups, which are at present unable to register with the Registrar of Societies because the Societies Act does not have a provision for them.

PRIVATISATION

The Privatisation Policy was adopted in 2000, with the Public Enterprise Evaluation and Privatisation Agency (PEEPA) set up a year later. The main aim of privatisation is to improve output growth through stimulating entrepreneurship and investment. Releasing some public assets into the private market is intended to enhance the level of efficiency and effectiveness of public enterprises and the economy as a whole, raising the country's growth potential by securing stronger flows of foreign direct investment (FDI) and technology transfer.

The privatisation process is being implemented in a careful and considered manner so as to minimise any possible negative side effects such as job losses in the affected enterprises and limited provision or curtailment of services. In the longer term, improved efficiency in the provision of utilities should have a positive impact on both the economy and employment.

All public enterprises earmarked for privatisation provide prospects for citizen economic empowerment, as citizens have the opportunity of taking over productive enterprises from the state as going concerns. These public enterprises have the capacity for capital market development through initial public offerings of shares through the Botswana Stock Exchange (BSE), as well as sales of shares owned by the state in enterprises listed on the BSE.

While progress on the sale of the larger parastatals has been slow-moving, a positive factor is that government no longer provides most of the finance for parastatal investment, as it did in the past on a large scale. The Public Debt Service Fund (PDSF) loan book has been sold. Most of the larger parastatals borrow from the market, and there has been net repayment to government in recent years.

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Approved in December 2009, the Strategy for the Rationalisation of Public Enterprises is aimed at eliminating any overlaps in parastatal mandates giving rise to inefficiency and duplication of efforts.

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Privatisation progress

The revised Privatisation Master Plan, which includes updated privatisation activities with clear timelines, is presently guiding the activities of PEEPA.

Progress has been made on the development of a transaction structure and implementation plan for the privatisation of the ***Botswana Telecommunications Corporation (BTC)***, and government is consulting other stakeholders on the proposals that have been submitted.

The work to develop a privatisation strategy for the ***National Development Bank (NDB)*** has also been completed, and the proposed strategy and associated divestiture action plan are being considered.

A decision was taken to defer the privatisation of ***Air Botswana*** after previous attempts proved unsuitable.

In the case of some parastatals not earmarked for outright privatisation, certain activities once performed in-house, such as asset procurement and disposal, and catering and cleaning services, are being contracted out to private sector service providers through PPPs.

The management and administration of ***Government Employees Motor Vehicle Advance and Residential Property Scheme (GEMVAS)*** is being outsourced. Following a tender process, and in line with Botswana's citizen economic empowerment strategy, UNI-GEM (Pty) Ltd, a private company made up of five public sector trade unions, was selected as the preferred investor to operate GEMVAS. The transfer of the scheme is scheduled for the first quarter of the 2010/11 financial year.

Public-Private Partnerships

Public-Private Partnerships (PPPs) provide a new framework for an efficiently functioning

society and private sector-driven economy, wherein government shifts its role over time to act principally as a facilitator, administrator and regulator.

The Public-Private Partnership (PPP) Policy and Implementation Framework, which includes implementation guidelines, standardised contract provisions and institutional structure, was approved in June 2009. Envisaged benefits of the policy include accelerated infrastructure provision and access to private sector financial resources and expertise. This should ease implementation constraints on government while yielding sustained efficiency benefits in infrastructure service delivery.

A PPP Unit is being established in MTI during the 2010/11financial year. The mandate of the Unit will include coordination and policy guidance, technical support to line ministries, capacity building, promotion of investment in PPPs and harmonising the roles of other players, such as PEEPA and PPADB, in order to avoid duplication of efforts.

MANUFACTURING

Manufacturing output increased by 7.5 percent in 2009, down from growth of 14.6 percent in 2008. The sector's share of GDP rose from 3.4 percent in 2008 to 4 percent in 2009. There were a total of 35 704 workers employed in the industry in 2009 compared to 35 888 in 2008.

Botswana's favourable investment climate has attracted foreign companies from around the world, namely South Africa, France, Belgium, China, India, the USA, UK, Sweden, Mauritius and South Korea. The wide variety of goods already manufactured for both local and export markets includes: polished diamonds and semi-precious stones; electronic and electrical items; engineering products; textiles, garments and other ancillary products; leather goods and canned products. Manufactured products constitute the bulk of Botswana's non-traditional exports, and growth in this area is essential for further economic diversification and sustainable growth.

Manufacturing firms are highly concentrated in urban areas such as Gaborone and Francistown. Botswana's third largest town, Selebi-Phikwe, is another principal location for large-scale light manufacturing, and has been chosen as a priority centre for regional industrial development.

A detailed six-year Medium Term Strategy contains a series of actions and projects aimed at boosting the manufacturing sector in Selebi-Phikwe. One of the key elements of the strategy is the establishment of the Selebi-Phikwe Economic Diversification Unit (SPEDU) to spearhead the implementation of the programme. Industries already established here comprise: garment manufacturing; jewellery; automotive accessories; structural engineering; sanitary-ware; furniture and mining accessories.

Legislation affecting the manufacturing sector, such as the Industrial Development Act, is discussed earlier in this chapter, under the 'Policies and Legislation' subheading.

New manufacturing projects

Established in 2007 with assistance from the Botswana Development Corporation (BDC) and CEDA's Venture Capital Fund, Tannery Industries Botswana (TIB) has two factories: a re-tanning factory in Lobatse and a finishing plant in Phakalane equipped to process 1 000 hides per day. At full production, the project will create around 120 jobs, of which 90 percent will be occupied by local Batswana in the production and technical fields.

A joint venture between BDC and China's Fengyue Company, the glass manufacturing project in Palapye will utilise locally available silica and soda ash, and should be operational towards the end of 2011. The project will produce float glass, mainly for the construction industry, and will guarantee employment for about 450 people, 85 percent of whom will be Batswana. The project is estimated to cost over P500 million and create in excess of 300 jobs.

Another BDC project in Palapye is the manufacture and supply of large-diameter steel pipes suitable for the transmission of water, steam, sewage, oil and gas. The total cost of this project will be over P130 million, and it should generate at least 200 jobs once complete. Other proposed projects include two pharmaceuticals, in Selebi-Phikwe and Gaborone.

Prospects for further development

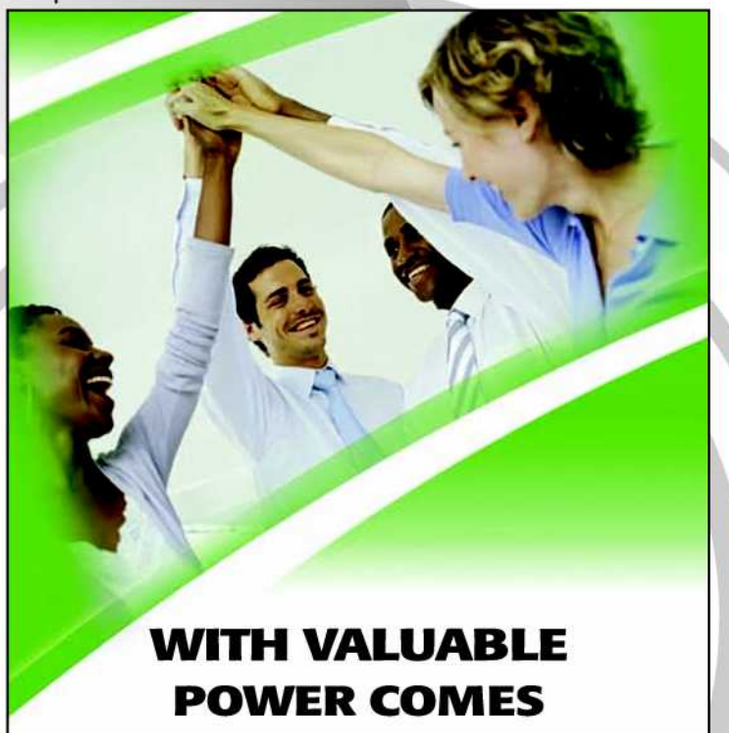
Batswana producers have had mixed success in exporting outside the region. While textile exports have grown rapidly – to the United States under the African Growth and Opportunity Act (AGOA) as well as to the European Union – it is doubtful that such exports would be able to compete without privileged access to these two markets.

A stimulus package is being developed for the textile industry, with government to pay half of each employee's salary as well as standing guarantor for CEDA loans. Companies in the industry are seeking extended Southern African Customs Union (SACU) duty credit certificates, utility and rent subsidy, sale and export incentives, as well as machinery and soft loan working capital. In addition, SACU is working on a long-term strategy for the region's textile and clothing industry, with the objective of developing a WTO-compliant strategy to replace the Textile and Clothing Industry Development Programme.

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SACU duty credit certificates, which are awarded according to the value of export sales, are part of an export incentive scheme aimed at assisting textile and clothing firms to become internationally competitive. The certificates can be used to offset duty on imported raw materials, or may be sold on to other manufacturers to use in the same manner.

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NDP 10 puts heightened emphasis on manufacturing that is based on Botswana's primary products where comparative advantage exists; hence, the call for beneficiation of as many raw materials as is commercially viable before export. Studies will be conducted during this development plan to identify imported products whose quantities provide a basis for commercially viable domestic production, thereby creating opportunities for FDI, joint ventures and SMMEs. BEDIA has planned a feasibility study on the establishment of a jewellery park, development of an Investment Master Plan, and sectoral studies for the establishment of special economic zones. Current strategies and programmes include the following:

- A draft policy and model law on ***Special Economic Zones (SEZ)*** in Botswana have been developed, and 414 hectares of land reserved for setting up export processing zones. An investor demand analysis, provision of infrastructure, development of a regulatory framework and establishment of a regulatory authority are now required. The regulatory framework will include special legislation relating to labour, immigration, taxation and customs.
- The ***National Export Strategy (NES)*** is aimed at enhancing production efficiency and export competitiveness, and focuses on identifying export markets as well as developing new approaches to strengthening the capacity of firms to produce goods that can compete internationally.
- BEDIA's ***Export Development Programme*** aims to build the capacity of local firms to export to world markets, and has provided training to companies in the arts and crafts, leather, garments, jewellery, chemicals and ICT sectors on quality control, factory flow production systems, new product development, export marketing plans, branding, packaging and pricing.
- A new growth model for small-scale industries, the ***garment cluster development model*** piloted in Thamaga and Molepolole has assisted in identifying the challenges that exist and interventions that should be taken to develop integrated micro-enterprises. The model is to be rolled out nationally and training provided for improved garment production to achieve essential delivery timelines and product quality.

Local procurement

From the inception of the Local Procurement Programme in January 2005 to March 2009, a total of P11.7 billion worth of locally produced goods and services were purchased. This amount comprises P709.7 million purchases from local manufacturers or producers, P5.4 billion from local service providers, P4.2 billion from local traders and P1.4 billion for associated inputs which need to be sourced from foreign-based suppliers. It is estimated that P5 billion (assuming traders are importing products), or 42 percent of the P11.7 billion, circulated within the local economy.

The Directive on the use of Locally Manufactured Goods and Services is being reviewed in order to evaluate its performance and come up with appropriate measures to assist both local manufacturers and service providers to increase their output for the domestic and export markets. The review was expected to be concluded in October 2010.

DEVELOPING ENTREPRENEURS

While welcoming skills and investment from outside, Botswana continues to support its own citizens by implementing programmes that enhance local participation in economic activities and business ventures. While the policy on citizen economic empowerment is still under preparation, there are ongoing efforts to promote empowerment – such as provision of student loans/grants for those qualifying for tertiary-level education, reserving some categories of business for citizens, and the local preference scheme.

Local enterprise development is set to receive P222 million during NDP 10 in order to increase the participation of local enterprise in the economy and the international market by encouraging the development of upstream and downstream industries' capacity, competitiveness and efficiency. Projects will include those in management information systems, enterprise competitiveness and the creation of a national enterprise development strategy.

Citizen economic empowerment is also promoted through the implementation of mega-projects in the country. The process entails the unbundling of large projects into smaller components that are more manageable for citizen contractors. Examples of these include: Dikgatlhong and Lotsane dams, expansion of Morupule Power Station, Botswana International University of Science and Technology, and the four Senior Secondary Schools in Nata, Shakawe, Mogoditshane and Mmadinare. Where projects are awarded to non-citizen contractors, such contractors are encouraged to outsource or subcontract some activities to smaller citizen companies. Capacity building of citizen artisans is also ongoing.

Government has over the years instituted a number of programmes and initiatives to empower local entrepreneurs and assist SMMEs. Funding, training and mentoring services are offered to Batswana wishing to go into business or to expand existing businesses through the autonomous and professionally-managed *Citizen Entrepreneurial Development Agency (CEDA)*, established in 2001. In addition to fostering citizen entrepreneurship and empowerment, the agency is tasked with achieving economic diversification, creating sustainable employment opportunities, promoting the development of vertical integration and horizontal linkages between citizen enterprises and primary industries in agriculture, mining and tourism, and improving efficiency in the delivery of services to business.

CEDA has developed a wide range of products that includes subsidised loan financing, equity funding, the Credit Guarantee Scheme and the Young Farmers' Fund. Broadening CEDA's product offering, the Arable Seasonal Loan (Ipelege) was launched in September 2008, and provides loans of up to P500 000 for dry land farming projects.

The *Local Enterprise Authority (LEA)* began operating in 2007 as a one-stop shop that provides development and support services to the needs of small, medium and micro enterprises (SMMEs), and today has 13 branches across Botswana. In particular, the authority targets women, youth and the unemployed. LEA's support services include facilitation of: technology adoption and diffusion; business planning, training, mentoring and advisory services; access to markets; identifying business opportunities for SMMEs; and promoting general entrepreneurship among citizens. While LEA does not provide financial services, it facilitates access to finance, as well as providing support services to SMMEs before and after funding.

From April 2007 to March 2009, LEA registered 9 718 applicants for its products and services, and trained 3 387 entrepreneurs. About 51 percent of current clients are in the agricultural sector, followed by manufacturing (22 percent), services (18 percent) and tourism (9 percent).

LEA embraces business incubation as a tool for enhancing the entrepreneurship development process. The business incubation project, which comprises the Pilane Multi-Purpose Incubator, Gaborone Leather Incubator and Glenn Valley Horticulture Incubator, will become fully operational during the 2010/11 financial year. In addition, the Francistown Light Industrial Incubator is scheduled for completion in the third quarter of 2010/11. During NDP 10 LEA will be working on an Enterprise Competitiveness Development Programme and a National Enterprise Development Strategy, among others.

In 2007, CEDA and LEA entered into a Memorandum of Understanding (MOU) for mutual cooperation, undertaking to work together to standardise the delivery of services to entrepreneurs, design standardised processes and procedures of referral for clients, and conduct follow-up on services provided. Furthermore, government has decided to transfer CEDA to the MTI to ensure focused services and enhance economic transformation. Training courses for SMEs are also provided by BOCCIM.

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SMALL, MEDIUM AND MICRO ENTERPRISES

Small, Medium and Micro Enterprises (SMMEs) currently comprise 32 percent of both the formal and informal sectors. Given their relatively low start-up costs and comparatively high potential for diverse economic activities, SMMEs are able to contribute significantly to entrepreneurial development, broad-based employment creation and poverty alleviation. Since most citizen-owned businesses are in this category, SMMEs are also considered the principal vehicle for citizen economic empowerment.

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Government is reviewing the Reservation and Price Preference Scheme, which was introduced in 2001 for citizen consultancies and construction companies. The scheme is geared towards the empowerment of citizen companies which participate in public procurement services. The purpose of the review is to develop revised price ceilings, thus enabling citizen companies to qualify for a wider range of tenders floated by the PPADB. The revised ceilings are expected to become operational during the 2010/11 financial year.

JOB CREATION

The comprehensive Labour Force Survey (LFS), which is carried out every ten years, covers both the formal and informal sectors. The 2005/06 survey indicated that from 1995/96 to 2005/06, total employment grew at an annual average rate of 4.7 percent, from 345 405 to 584 594 persons. Over the same period, the national unemployment rate decreased to 17.5 percent from 21.5 percent in 1995/96. While two-thirds of those unemployed reside in urban areas, it is also evident that unemployment is most heavily concentrated among young people, with the highest unemployment rate of 34.9 percent recorded in the 20 to 24 year age group.

The LFS shows that the numbers of self-employed grew at an annual average of 6.7 percent over the ten years since the previous survey, compared with a growth rate of only 1.7 percent in 'paid employees' over the same period. The category 'self-employed' is not the same as the informal sector, but most (61 percent) of those in the informal sector were self-employed in 2005/06, and a further 23 percent consisted of unpaid family labour (most of whom worked in informal sector businesses). This latter category increased at an annual average rate of 18.1 percent over the same ten years.

During 2008, the Central Statistics Office published the preliminary results of the Informal Sector Survey conducted in 2007. Since the previous survey in 1999, the number of informal businesses in Botswana has grown by 40 percent to over 40 000. Females were predominant in the sector, operating two thirds of informal businesses, which were concentrated in retail and other small-scale services such as hairdressing. Male business operators were found in subsectors such as construction. In terms of challenges facing their businesses, most survey respondents cited failure by customers to pay for goods and services obtained on credit, together with stiff competition and lack of capital.

The 2009 Formal Employment Statistics Brief estimated a 3 percent increase in formal sector employment, from 308 617 in March 2008 to 317 827 in March 2009. During this period the private sector was the largest employer, with over 179 000 employees,



followed by central government (96 167), local government (28 162) and parastatals (14 497). The private sector registered an increase in employment of 3 132 employees, from 175 868 to about 179 000, while central government had an increase of 4 712 employees, local government 1 148, and parastatals 217.

Notwithstanding this achievement, the impact of the global recession on the Botswana labour market was seen in the loss of employment through retrenchments in mining and manufacturing. Major national projects such as the Morupule B Power Station Expansion, Mmamabula Energy Project, North-South Water Carrier II Pipeline, Botswana International University of Science and Technology, University of Botswana expansion, medical school, Zambezi Integrated Agro-Commercial Development Projects, tourism development and the construction of major dams have, however, the potential to create additional job opportunities.

In an effort to create temporary employment on a rotational basis and to enhance citizen participation in economic development, government introduced the Ipelegeng Programme in July 2008, targeting people with no or limited sources of income. Between April 2009 and February 2010, the programme has cumulatively employed 234 462 people, comprising 172 686 females and 61 776 males. During NDP 10 government expects to spend P1.4 billion on the programme at an annual expenditure of P200 million.

PRODUCTIVITY

For Botswana to compete internationally and attract additional FDI, greater operational efficiency and productivity is needed in both the public and private sectors. This hinges on a labour force that is efficient, productive and reliable, an environment conducive to cooperation between workers and employers, and a first-class dispute resolution mechanism.

It is important to relate wage increases to increases in labour productivity in order to contain inflationary pressures. Government is nevertheless cognisant of the fact that prolonged wage restraint to promote exports would ultimately generate social costs as well as affecting growth and productivity in the long term.

As the national facilitator of productivity and quality knowledge and methods, the ***Botswana National Productivity Centre (BNPC)*** has been pivotal in creating a new mindset regarding performance improvement, sustainable productivity and quality development. Productivity awareness interventions are given top priority so as to develop and maintain the required culture of excellence within Botswana.

In 2002, a Perception Study revealed that productivity awareness had risen from 7 percent in 1996 to 41.3 percent. The 2007 Perception Study indicated that this figure has now risen to an average of 89 percent in urban and semi-urban rural areas, which is a testament to the success of the BNPC's awareness interventions.

According to the 2007 productivity indicators, the services sector, constituting the commerce, transport and communications, finance and business services sectors, continues to perform better than the goods-producing sector, comprising the mining, manufacturing, utilities and construction sectors. While transport and communications saw the most growth within the services sector, manufacturing was the best performer in the goods-producing sector, having consistently recorded positive multifactor productivity growth rates exceeding 3 percent.

The BNPC has been responsible for the implementation of the Performance Management System (PMS) within government. Training and consulting interventions in Quality Management Systems or ISO Standards, Service Quality and Supervisory Development Programmes are carried out for the private sector. Efforts have also been made to involve the labour movement further in productivity initiatives.

Over the past few years, BNPC has focused on the empowerment of SMMEs to supply major consumers, the development of a Botswana Quality Workforce Index and the Customer Satisfaction Index Pilot Project.

Collaboration with various stakeholders takes place locally and abroad. BNPC is a founder member of the Botswana Excellence Foundation, an independent non-profit making trust which strives to promote and institutionalise a culture of excellence.

In addition to BNPC, bodies such as the Directorate of Public Service Management (DPSM) are vital in the implementation of productivity enhancing measures like organisational reforms. Consult the '*Education & Training*' chapter for further information on organisations involved in training and productivity enhancement.

LABOUR RELATIONS

Harmonious industrial relations are seen as one of the key elements necessary for creating a business-friendly environment.

The Ministry of Labour and Home Affairs is responsible for labour administration services, which include labour inspections, trade disputes resolutions, social security protection, issue of residence and work permits, registration and placement of job seekers, promoting good industrial relations, occupational health and safety, and workers' compensation. Established in 1994, the Industrial Court settles trade disputes and secures, maintains and furthers good industrial relations in Botswana. A specialised court with the same status as the High Court of Botswana, the Industrial Court has, through the Trade Disputes Act, jurisdiction over any individual or collective labour dispute.

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employers on cases of individual grievances and collective bargaining, and represents them in tripartite bodies such as the National Employment, Manpower and Incomes Council (NEMIC), comprising representatives of labour, employers and government. The Botswana Federation of Trade Unions (BFTU) is the official co-ordinating body of the trade union movement.

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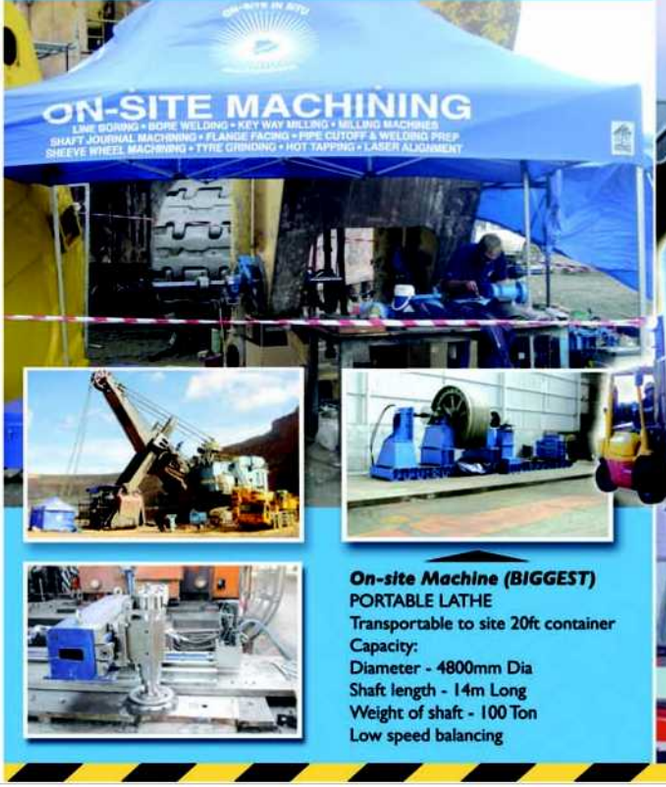
TRADE UNIONS

Before 2005, there were 29 unions, all in the private sector. Between 2005 and 2007, an additional 22 new unions were formed. Currently there are 54 registered trade unions, one federation of trade unions and one employers' organisation. Of the 54 trade unions, 34 are public sector and 20 private sector.

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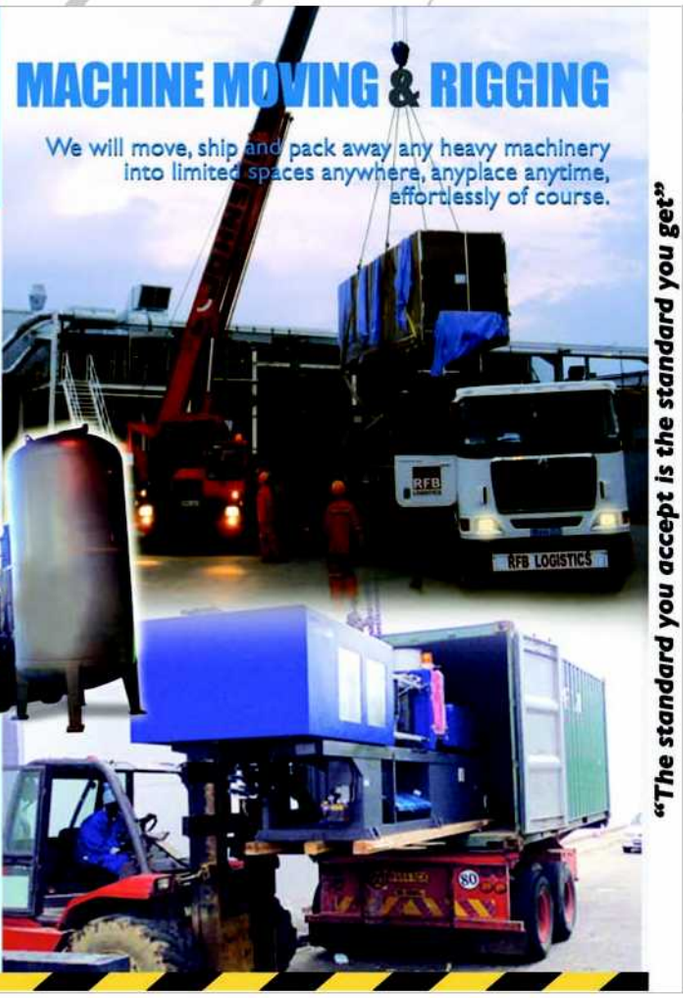
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The Government of Botswana through the Ministry of Communications, Science and Technology and partners has embarked on a project that is expected to contribute tremendously to the growth and diversification of Botswana's economy. This project, entitled the Botswana Innovation Hub, will attract both local and foreign business, research and advanced training institutions to Botswana.

Botswana Innovation Hub will be an enabling environment where technology-driven and knowledge-intensive industry, researchers and higher education and public sector work together to foster innovation and new business. The proposed sectors to be established on the Hub will be those in which Botswana has a competitive edge and include:

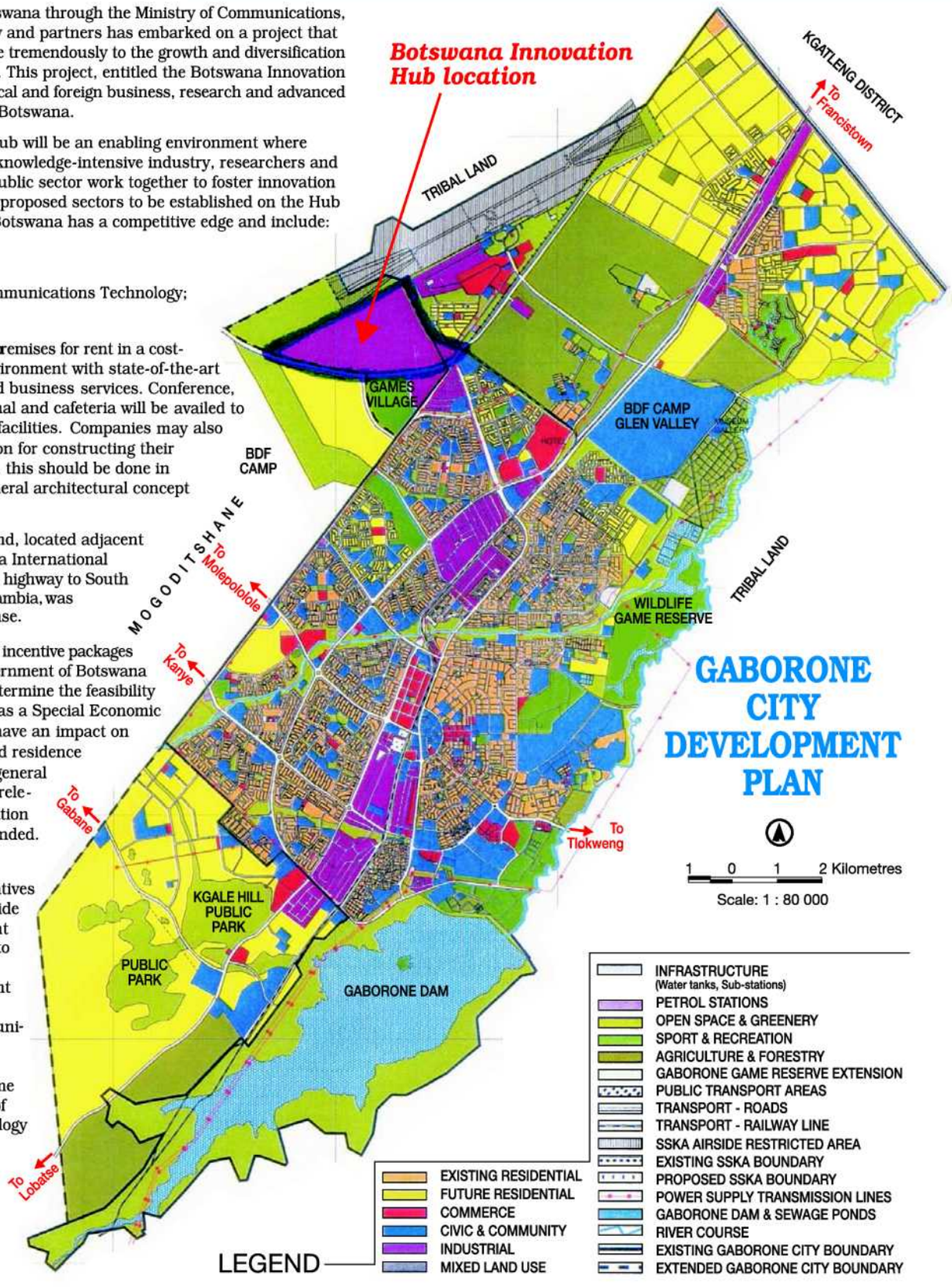
- Biotechnology;
- Energy;
- Information and Communications Technology;
- Mineral technology.

The Hub offers secure premises for rent in a cost-effective and flexible environment with state-of-the-art telecommunications and business services. Conference, meeting, staff recreational and cafeteria will be availed to Hub tenants as shared facilities. Companies may also negotiate land acquisition for constructing their own premises. However, this should be done in accordance with the general architectural concept of the Hub.

A 57 hectare piece of land, located adjacent to the Sir Seretse Khama International Airport and close to the highway to South Africa, Zimbabwe and Zambia, was secured for the first phase.

To guarantee competitive incentive packages for the investor, the Government of Botswana undertook a study to determine the feasibility of establishing the Hub as a Special Economic Zone. This would then have an impact on the tax regime, work and residence permits, as well as the general trade environment. The relevant policies and legislation will be drafted and amended. (www.bih.co.bw)

A number of other initiatives are in the offing to provide a conducive environment for the Innovation Hub to thrive. These initiatives include the enhancement of Botswana's local and international telecommunications connectivity, implementation of an e-government programme and the establishment of the Science and Technology University.



The normal working week for factory workers varies from 45 to 48 hours. Normal overtime is remunerated at one and a half times, and double on Sundays and public holidays. A worker is entitled to 14 days sick leave per year. There are 15 public holidays per annum.

Policies and legislation

In recent years, the rapid growth of trade unions in both the public and private sectors has been facilitated by the changing of labour legislation following the ratification of international labour standards in 1998. During NDP 9 there was significant growth in unionisation of the public sector following the enactment of new legislation to facilitate the right to organise and engage in collective bargaining. The Employment Act was also reviewed to protect workers' claims in the event of the insolvency of the employer.

The Trade Disputes (Amendment) Act of 2004 introduced a one-stop mediation process with a 30-day time limit. Labour disputes lodged at a District Labour Office that are not resolved within that time are referred directly to the Industrial Court. A panel of full and part time mediators and arbitrators, under the chairmanship of the Commissioner of Labour, deals with trade or labour disputes.

The Revised National Policy on Incomes, Employment, Prices and Profits was amended in 2005 to introduce minimum wages for agricultural and domestic employees. The objectives of the revised policy are to moderate wage growth as a means of enhancing international competitiveness, to spread the benefits of development as widely as possible, and to expand productive employment opportunities.

Under NDP 10, labour laws are being fine-tuned to the provisions of the International Labour Organisation (ILO) Conventions ratified by Botswana. The Employment of Non-Citizens Act will be reviewed in order to address issues that hamper Botswana's competitiveness, such as restrictive labour regulations and the poor work ethic in the national labour force. An action plan on child labour will be developed to ensure compliance with international obligations and an HIV/AIDS and employment policy will developed.

Furthermore, an independent dispute resolution system is being established to do away with the use of industrial relations officers and part-time mediators and arbitrators from the private and parastatal sectors. In addition, the capacity of labour inspectors will be strengthened in terms of both quality and quantity.

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The Public Procurement and Asset Disposal Board (PPADB) was established by an Act of Parliament (Cap 42:08) promulgated in 2001 as one of the public reforms aimed at enhancing good governance in public procurement and asset disposal.

The principle mandate of the Board is to adjudicate and award bids for procurement of public works, supplies and services, as well as the disposal of public assets. In addition, the Board registers contractors and ensures that those registered with PPADB observe a Code of Conduct approved by the Minister of Finance and Development Planning. Furthermore, the Board shall ensure that non-performing contractors are disciplined in accordance with the applicable legal provisions.



Currently, the Board maintains a register of contractors limited to Works, some aspects of Information Communications Technology (ICT) and manufacturing and the supply of Medicines, Laboratory Reagents and Medical Equipment to facilitate the implementation of Government policies meant to promote citizen economic empowerment programmes / strategies. An appropriately contrived and comprehensive registration system for contractors in Services, Supplies and Works which will accord with international best practice is being developed and will be concluded in due course.

MINING BOTSWANA

Exploitation of Botswana's rich diamond reserves has seen it graduate from one of the poorest nations in the world to a middle-income country. For decades diamonds have been the major contributor to the Gross Domestic Product (GDP), exports and government revenue, bringing in the foreign exchange earnings which have allowed substantial investments to be made in the country's physical and social infrastructure.

The share of mining in Botswana's GDP rose from close to zero in 1966 to 12 percent in 1971/72 and

Botswana's economy is centred on its considerable mineral reserves – diamonds in particular – although copper, nickel, coal, gold, soda ash and salt are also mined.



BCL LIMITED COPPER-NICKEL PLANT

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up to a high of 47 percent by 1986. In the decade between 1998 and 2008, its contribution averaged around 40 percent. The mining industry has proven extremely attractive to investors due to factors such as Botswana's stable political environment and excellent mining laws that encourage exploration and mine development.

However, when mining activities began to decelerate in 2007/08 as a result of the major diamond mines in the country having reached maturity, mineral revenues, mostly from diamonds, fell from 48 percent of total government revenue in 2006/07 to 43 percent in the following fiscal year. In 2008, mining nevertheless continued to be the highest contributor to revenue from merchandise exports at approximately 82 percent. At this time, escalating costs were among the principal reasons for both the cancellation of the Botswana Metal Refinery project and the scaling down of the proposed mine and power station development on the Mmamabula coal field.

Then, as commodity prices plummeted in the wake of the global financial crisis, resulting in the closure of the larger diamond mines and therefore hardly any diamond production in the first quarter of 2009, mineral revenues declined further to 31 percent of total government revenue in 2008/09. New companies, such as DiamonEx and Messina Copper, which commissioned their operations during 2008, were especially hard hit by the crisis.

The partial recovery of the mining sector in the second and third quarters of 2009, with rough diamond prices trending upward, reflected positive developments in the world economy. However, although the major mines reopened in April 2009, several of the smaller ones remained closed, and output was well below the long-term trend. This fed through to other local producers, both upstream suppliers and downstream consumers of mining output, including the infant domestic diamond cutting and polishing industry and associated services. In 2009, according to the Kimberley Process Annual Global Summary, Botswana exported 17.7 million carats with a total value of US $1.43 billion.

Recovery in 2010 and beyond

Following on from the gradual recovery in world markets during the second half of 2009, 2010 saw the diamond market pick up substantially. By mid-2010 diamond prices had recovered to pre-crisis levels and diamond exports for the first eight months of 2010 totalled US $1.83 billion – 60.3 percent more than the corresponding period in 2009. This has led De Beers chief Gareth Penny to state that he foresees demand from China rising to challenge that from the United States, and that the future could hold significant supply issues as mine capacity is not replaced.

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DIAMOND EXPORTS HAVE MORE THAN TRIPLED

Botswana's exports stood at US $290.9 million in August 2010 – an increase of 360.3 percent from August 2009.

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The mining industry's crucial role as Botswana's principal generator of foreign exchange earnings seems to have been revived, along with its importance as a generator of jobs. Despite these positive developments, the volatility of commodity prices underlines the need to find alternative sources of economic growth besides diamonds.

During National Development Plan 10 (NDP 10), the focus is on supporting value addition and the development of new industries. The Botswana Diamond Hub will provide a diamond trade centre for rough and polished diamonds, as well as establishing sustainable downstream industries (cutting and polishing, and jewellery manufacturing). Efforts will also be geared towards identification of additional mineral resources, and the promotion of small and medium-scale mining.

Beyond NDP 10, state mineral revenues are expected to decrease substantially due to depletion of diamond resources at the existing diamond mines. This will result in lower production and an increase in costs (capital and operating) of mining as the ore is progressively mined at depth. Diamond revenues are projected to peak around 2015, and to decline steeply after 2021. Local value addition through the diamond hub activities will help offset revenue reduction from primary diamond production.

As regards beneficiation projects, polished diamonds are mainly for international markets, while coal beneficiation is viable through the conversion of coal to electricity for exports, and soda ash beneficiation for glass manufacturing is driven by the construction industry. Gold and copper-nickel refining is not feasible at the moment because the quantities produced are too small to justify building refineries.

MINING FRAMEWORK

The state body responsible for developing and implementing the fiscal, legal and policy framework for mineral exploration and exploitation is the Ministry of Minerals, Energy and Water Resources (MMEWR). Exploration is administered through the Department of Geological Survey, while mining and related activities are administered through the Department of Mines. MMEWR also administers various mineral agreements, undertakes promotion of investments in minerals and liaises with bilateral and multilateral development partners on mineral related matters.

While MMEWR exercises a licensing, monitoring and facilitating role in mineral exploration and exploitation, prospecting and mining activities are carried out by private companies. The Botswana government has significant shareholdings in all the large mines, where the level of shareholding has been mutually agreed with private investors.

The Mines and Minerals Act (Act 17 of 1999) ensures security of tenure for potential investors while minimising administrative uncertainties. In April 2009, government initiated amendment of the Mines and Minerals Act and the Mines, Quarries, Works and Machinery Act as a means of improving the regulatory framework. Areas that will be covered by the legislation include mine site rehabilitation and closure plans and regulations governing uranium

operations, as well as regulations governing exploration and exploitation of Coal Bed Methane.

Mineral policy and strategies for NDP 10

Botswana's Mineral Development Policy aims to:

- Maximise the economic benefits of mining, including opportunities for citizens to participate directly in mining, whether as contributors of capital, labour, goods or services
- Create a competitive environment that will stimulate private sector investment in minerals exploration and mining operations
- Regulate the minerals industry in a way that ensures the most efficient and beneficial investigation and exploitation of mineral resources, with proper regard for the health, safety and welfare of employees
- Ensure efficient collection of fiscal revenue due to government from mineral operations
- Ensure that appropriate safeguards against negative environmental and societal impacts are in place as a condition for mining operations to take place
- Collect and disseminate geological and minerals-related information to promote investment in the minerals sector

Exploration and techno-economic studies funded by government will be conducted into mineral commodities, with the emphasis on diversification away from diamonds, to induce interest and investment by the private sector, including participation by locals. The NIGIS database developed during 2009 will become operational, thereby affording access to old, new and reviewed geo-scientific models of mineral prospects, as well as available prospecting ground.

Citizen participation in the mineral sector is to be promoted, with efforts made to address the challenge of constraints in financing, and the high risks in exploration and development. Small-scale industrial mineral resources projects will be packaged to bankable feasibility, and linkages with development and financial institutions established.

PROMOTING SMALL-SCALE MINING

There are currently 32 licensed junior mines (18 of which are operational) mainly engaged in the extraction of industrial minerals such as quarry or crushed stone and the mining of clay for brickworks. Potential exists in the production of dimension stones, coal and base metals such as copper, nickel and zinc.

One of the challenges experienced during the previous NDPs – that of entities acquiring mineral concessions without the financial and technical resources to effectively explore the concessions area – will be addressed through the introduction of competitive bidding for prospecting licenses in selected strategic areas. The Botswana Mining Code prescribes negotiations between the Government and an applicant for a mining license for diamonds; in NDP 10 this will be broadened, where considered prudent, to include large projects in particular and non-diamond projects.

Local value addition to diamonds will be pursued through the activities of the Diamond Hub. The volume of diamonds supplied to the local cutting and polishing



factories will be increased to over US $1 billion per annum. This will attract related support industries, such as diamond banking, insurance and security to Botswana. It is anticipated that during the early part of NDP 10 diamond aggregation by Diamond Trading Company International will also relocate from London to Gaborone.

The beneficiation of industrial minerals will be promoted to enhance import substitution for construction materials and dimension stones. Government is also looking at providing incentives in the mining code for joint ventures between citizen and foreign companies in an effort to promote the transfer of capital and skills.

With recent developments in the energy sector having significantly increased the value of coal, a Coal Road Map will be developed which will outline options for beneficiation of coal. This includes coal to hydrocarbons, coal for export and coal for power generation.

Capacity building is also in the spotlight, with engineering, geo-scientific and artisan skills in short supply. In partnership with key stakeholders such as the Botswana Chamber of Mines and training institutions, government is to prioritise the development of skills in the sector. The Botswana International University of Science and Technology (BIUST) will help to support this aim.

The Mines and Minerals Act facilitates exploration and diversification of production into other minerals not currently being exploited, while new mine developments are encouraged through improved generation and dissemination of mineral information to potential investors. The National Geoscience Information System (NGIS) consolidates such information, facilitating speedy access for investors to digital data, including prospecting, mining and geological maps, through the internet. On-line applications for both prospecting and mining licenses are also available.

At the end of March 2009, there were 93 active exploration companies operating in Botswana. Of these, 29 were exploring for precious stones, with the balance exploring for various other minerals. A total of 1 041 licenses were issued, comprising 650 for metals, industrial and energy minerals, and 391 for diamonds. Botswana is still considered to have strong potential for diamonds, coal and base metals such as copper and nickel, particularly in the north-eastern part of the country.

Discovery Metals Limited of Australia successfully completed a bankable feasibility study on the Boseto Copper Project in Ngamiland near Toteng Village in the third quarter of 2010, and production of the first concentrate is planned for 2012. Exploration for uranium and zinc around Serule and Western Ngamiland, by A-Cap Resources and Mount Burgess respectively, is also at the pre-feasibility study stage.

Significant discoveries have been made at A-Cap Resources' large Letlhakane and Serule uranium projects resulting in a global resource of 158 million pounds of uranium oxide (at a 100ppm cut-off) that has been defined in accordance with the JORC code.

Impact Minerals' prospecting licences in Botswana cover 350 kilometres, with five priority targets having been identified. A number of significant uranium deposits have been discovered, three at Kodibeleng and one at Lekobolo, with the latter about 100 kilometres to the north-east of Kodibeleng and close to A-Cap Resources' Letlhakane Project. Drilling at the Sua Prospect was scheduled to commence in early August 2010.

Firestone Diamonds has identified around 80 kimberlites at its Tsabong diamond field, with a total of 100 expected in the region. Leading this group is the massive 146-hectare MK1 kimberlite. Further exploration and bulk sampling has still to be performed before development can take place, and the possibility of bringing in a joint venture partner has been discussed.

Boteti Exploration (Pty) Ltd, which holds the AK06 diamond mining license, is owned by the Canadian company Lucara Diamond Corp (70 percent), Wati Ventures (1 percent) and African Diamonds (29 percent). Debot – the exploration arm of Debswana – sold its effective 70 percent interest in the AK06 deposit to Lucara in December 2009 as smaller mines like AK06 do not currently fit into De Beers' global production portfolio.

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In mid-2010, Botswana was ranked first in Africa and one of the most attractive jurisdictions world-wide with respect to mining exploration and development by Canada's Fraser Institute. Indicators encompassed: administration, interpretation and enforcement of existing regulations; taxation regime; policy potential; community conditions; political stability and labour regulations, among others.

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DIAMONDS

Following the discovery of diamonds shortly after Botswana's independence, the country has become the largest producer of diamonds by value in the world. The three principal diamond mines, comprising Orapa, Letlhakane and Jwaneng, are operated by Debswana Diamond Company. Mining licences at all of Debswana's diamond mines will run until 2029.

Diamond mining and production

Diamonds were originally discovered in 1967 in three pipes that now make up the Orapa and Letlhakane mines. Production began at the Orapa pipe, about 250 kilometres west of Francistown, in 1971, while the two pipes at Letlhakane began producing in 1977. Diamond-bearing kimberlite pipes were discovered in 1973 in the Naledi River valley near the village of Jwana, and Jwaneng mine, which is presently the world's largest diamond producer by value, started operating in 1982. Located about 15 kilometres northeast of Orapa, Debswana's Damtshaa Mine was commissioned in November 2002, has a capacity of 500 000 carats per annum and an estimated mine life of 30 years.

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Between 2003/04 and 2008/09, Debswana Diamond Company consistently produced over 30 million carats per year from its mines at Jwaneng, Orapa, Letlhakane and Damtshaa, with record production of 34.29 million carats in 2006.

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While the diamond market performed exceptionally well during the first three quarters of 2008, during which period prices increased by about 20 percent, the ensuing global financial crisis led to a sharp decline in both diamond prices and sales over the final quarter of the year. As a result, production at all the Debswana operations was suspended between February and April 2009. Furthermore, DiamonEx Botswana's new Lerala mine, which had only begun producing in the third quarter of 2008, went into care and maintenance in February 2009. These developments saw diamond revenue forecasts for 2009/10 declining to P6.9 billion compared to actual revenue of P10.8 billion for 2008/09.

The recovery in world markets and diamond prices, which began in the second quarter of 2009, has seen renewed confidence in the sector. Despite many current challenges – such as diamond equity, shifting consumer patterns

and the emergence of synthetic diamonds – Debswana is optimistic about its operations. At the beginning of 2010, the company set a production target of 20 million carats for the year. By August of that year Debswana indicated that this figure was 'more than achievable'.

Firestone Diamonds owns 90 percent of the 8.5-hectare B/K11 kimberlite pipe located near the Letlhakane and Orapa mines. Commercial mining operations began in the second quarter of 2010, and the mine is currently producing at about three quarters of its 150 000 carats per year capacity, with full production expected to be attained by the end of 2011. The discovery of a 13.74 carat diamond – a stone which is expected to command in the region of US $5 000 per carat – in the early stages of production has had a profound effect on the average value of the diamonds recovered so far, from US $149 per carat to in excess of US$ 250 per carat. The initial life of mine is estimated at around ten years.

Diamond production: looking ahead

Diamond production has been based on low-cost surface mining. However, during the next decade diamond mining will experience changes to its production, processing and marketing systems. Major milestones will be the introduction of waste recycling in 2012, the rapid depletion of the diamond pipes from 2018, and moving mining to higher-cost underground production around 2020. These will affect the economics of the industry in fundamental ways, through increased production costs and the anticipated sharp downturn in revenue in NDP 11.

Debswana Diamond Company

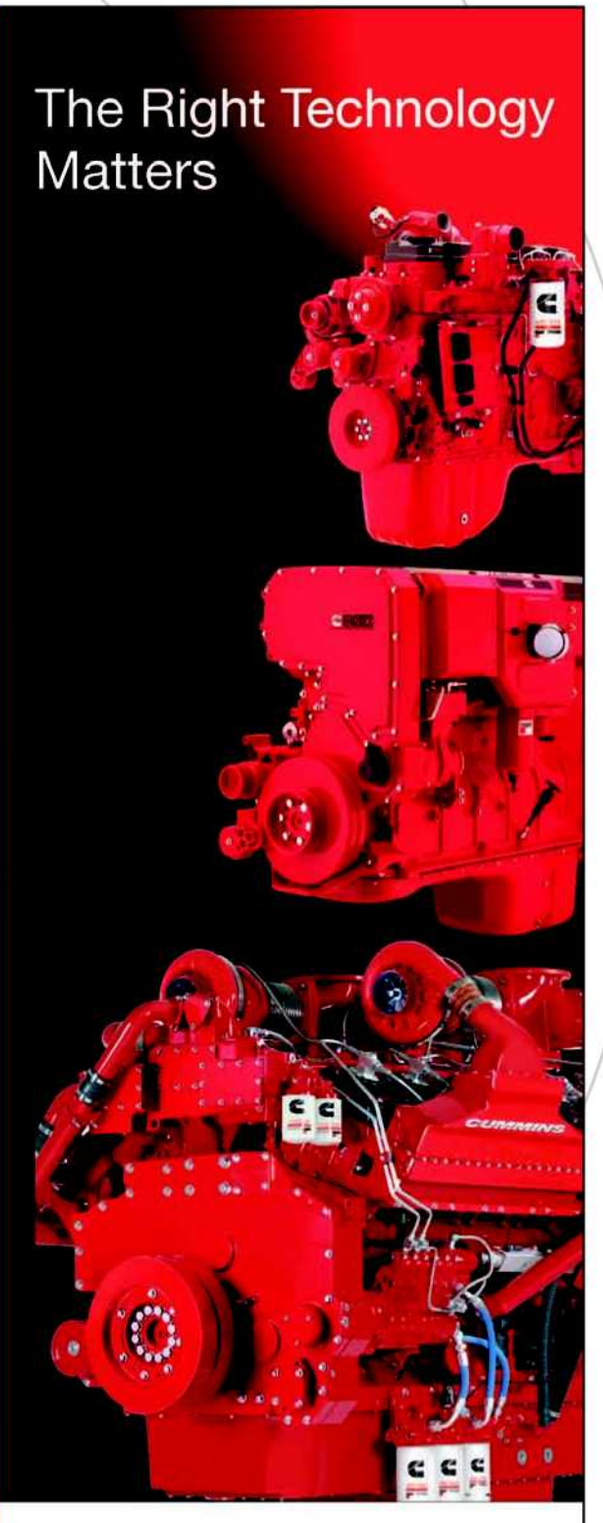
Debswana Diamond Company operates the Orapa, Letlhakane, Jwaneng and Damtshaa mines. Owned in equal shares by the Botswana government and De Beers, Debswana is a world leader in mining and sorting, valuing and exporting diamonds destined for the trading centres and markets of the world.

The Jwaneng Mining Licence, which expired in August 2004, was renewed for a further 25 years in 2006. As part of the agreement for the renewal of this mining licence, the Orapa, Letlhakane and Damtshaa mining licences were extended to run concurrently with the Jwaneng mining licence. At this time it was also agreed that Debswana's production would continue to be sold to the Diamond Trading Company for another five years.

The agreement also included the setting up of the Diamond Trading Company Botswana (DTCB), to take over the activities undertaken by Botswana Diamond Valuing Company, as well as distribution of diamonds to local cutting factories. The DTCB building has been constructed and operations commenced in March 2008. Establishing DTCB will also benefit the development of the financial sector, as huge quantities of financial transactions will go through Botswana.

Phase One of the Orapa Resource Extension Project (OREP) ran between 2006 and 2008 and helped to establish a new volume, geological and density model for the mine's resources. An extensive diamond core drilling programme was begun in 2010 as part of the second phase of OREP, which targets the resource to be mined during 2017-2026 while also assessing the value of potential resources at even deeper levels so as to develop long-term mining plans beyond 2026.

A major extension project at Jwaneng – known as Cut (8) – kicked off in February 2010. The project is a key element in Debswana's North Star strategy and is the largest ever single capital commitment in the



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private sector in Botswana. It will ensure profitable and continuous production at the mine until at least 2025. The estimated project investment is likely to total US $3 billion over the next 14 years. At its peak, it will create more than 1 000 jobs.

Open pit operations at Letlhakane Mine will come to an end in 2014. However, there are adequate resources, such as coarse tailings, to ensure a certain measure of sustainability beyond 2014. In addition, alternate mining options are currently being investigated to determine the economic viability of mining the resources post 2014.

Diamond manufacturing

Under NDP 9, the Diamond Trading Company Botswana (DTCB), a 50/50 joint venture between the Government and De Beers, was formed to take over the functions of the Botswana Diamond Valuing Company and some of the functions of the Diamond Trading Company International. This has effectively transformed Botswana into a major world diamond sorting, valuing and marketing centre.

By 2010, US $550 million worth of rough diamonds were to be allocated annually by DTCB, with up to 80 percent of those diamonds polished in Botswana factories. This comprises about 4 percent of the global rough diamond production value of US $13 billion. By 2016, the proportion of locally traded rough diamonds will increase to a level mutually agreed by government and suppliers.

The Botswana Diamond Hub was established at the end of NDP 9 to develop a sustainable secondary diamond industry in Botswana, including diamond cutting and polishing, promotion of both polished and rough diamond trading, and diamond jewellery manufacturing and retailing. Key activities include establishment of the diamond office, a one-stop-shop for diamond cutting and polishing factories, a rough and polished diamond trading centre and construction of a national gemmological facility. Programmes are to be developed at Oodi College of Art and Technology to assist the industry.

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Diamond cutting and polishing factories increased from four in 2004 to 16 in 2008. By March 2010, these 16 licensed diamond cutting factories employed 2 489 people.

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COPPER-NICKEL

Copper-nickel is mined at Selebi-Phikwe, Selkirk, Phoenix and Mowana; and other potentially exploitable copper resources are known to exist. The industry is heavily dependent upon favourable world market prices for base metals. The performance of nickel is of particular importance as its price is around four times that of copper, making it the bigger revenue earner.

The main player in the industry is BCL Limited: the second largest employer after government with a staff complement of over 4000. BCL produces two types of copper-nickel matte at its Selebi-Phikwe mine: low sulphur and high sulphur matte. The high sulphur is refined by Xstrata Nickel Refinery in Norway, while Empress Nickel Refinery in Zimbabwe refines the low sulphur matte.

During 2007, BCL undertook a major refurbishment of the smelter plant and is also involved in other projects to improve its overall performance. During 2008, BCL remained in a healthy financial position, with adequate financial reserves to see it through the economic crisis. In 2009, the total value realised from mine-wide improvement initiatives came to some P135 million, including cost savings of about P75 million. BCL also has the potential to extend the life of mine beyond 2020 subject to completion of the ongoing pre-feasibility study, with exploration having shown an additional inferred resource of 31.5 million tonnes at 0.66 percent nickel and 0.54 percent copper.

Copper-nickel ore is also mined at Phoenix by Tati Nickel Mining Company, which owns the Phoenix mine, Dense Media Separation (DMS) plant, five million tonne per annum concentrator, and the Selkirk deposit. Norilsk Nickel is the controlling shareholder (85 percent) and the Botswana government a minority shareholder (15 percent). The mine produces contained nickel in concentrates, which is toll smelted by BCL Limited in Botswana and refined by third parties. Phoenix Mine has undergone a capacity expansion project and open pit operations have been extended, making the mine one of the largest producers of nickel in Africa and placing Tati Nickel among the most competitive nickel producers in the world.

A total of 10.7 million tonnes of ore were mined in 2009, with 6.9 million tonnes of ore processed by the DMS plant commissioned at the end of 2008. By 2009 year-end, the rate of capacity utilisation had reached 87 percent and overall nickel recovery at the concentration plant reached 88.6 percent. Some 363 000 tonnes of concentrate with an average nickel grade of 5.4 percent was produced during 2009. In an attempt to extend the mine's life beyond 2016, the company is actively expanding the project's resource base, with target areas for exploration having been identified and licenses for these areas obtained.

Messina Copper, a subsidiary of African Copper PLC, was issued a mining licence in December 2006 over the old Bushman Mine near Dukwi. Construction at Mowana Mine commenced during 2007 and commissioning occurred during the second quarter of 2008, with concentrate production commencing during the last quarter of 2008. The production capacity of the mine is 300 000 tonnes of copper concentrate per annum. On account of the fall in commodity prices, operations were suspended between January and August 2009. The mine has a lifespan of six to seven years as an open pit, whereafter underground mining, (with a lifespan of 15 to 20 years) may be pursued.

SODA ASH

Salt and soda ash is produced at Sua Pan by Botswana Ash (Pty) Ltd. The plant has a production capacity of 300 000 tonnes of soda ash and 650 000 tonnes of salt per annum, with soda ash reserves expected to last until 2080.

Supplies of soda ash, an important chemical used in the steel, glass, paper, textile and detergent manufacturing industries, are presently sufficient for most of the chemical and metallurgical needs of the subcontinent. Exported to South Africa, coarse salt is needed for the production of chlorine and caustic soda. Furthermore, both fine and coarse salt is supplied for domestic consumption throughout southern and central Africa.

Beginning production in 1991 as Soda Ash-Botswana, today Botswana Ash is one of the continent's major producers and suppliers of soda ash and salt, and has continued to improve on its performance since restructuring in 1995. Shareholders include the Botswana Government (50 percent) and AECI, Anglo American Corporation and De Beers with 14 percent each, while the remaining 8 percent is held by financial institutions.

Although its long-term viability is favourable, the industry remains susceptible to adverse weather conditions as well as increased competition from other producers. Logistical challenges continue to restrain Botswana's ability

to access the growing soda ash and salt markets in areas such as the Democratic Republic of Congo (DRC) and Zambia. Sales for soda ash to Zimbabwe are still low due to the country's economic difficulties.

COAL

While coal mining is relatively small-scale at present, Botswana has abundant coal resources estimated at over 212 billion tonnes. Coal deposits are currently exploited at Morupule, and a mine is being developed to exploit the Mmamabula deposits, which comprise a 2.3 billion tonne coal resource. Furthermore, feasibility studies indicate some 1.3 billion tonnes of coal reserves in the Mmamantswe area.

Situated between Serowe and Palapye, Morupule Colliery Limited (MCL) is a subsidiary of Debswana. Producing coal primarily for domestic power supply and the mining industry, Morupule also supplies graded coal to Zimbabwe, Zambia and the DRC. Major customers include Morupule Power Station, BCL Limited and Botswana Ash. While MCL has the capacity to produce about a million tonnes of coal per year, production at this level has up to now been constrained by demand.

MCL is expanding its operations at a cost of P1.5 billion to meet requirements of the Morupule Power Station Expansion Project. The colliery expansion will see production levels increase to 2.8 million tonnes per annum. Construction began in September 2010 and the first coal from the expanded mine and plant is expected in November 2011.

The global in situ mineral resource estimate for CIC Energy's Mmamabula coal field totals approximately 2.63 billion tonnes, with 98 percent in the measured category. CIC Energy is looking to develop a mine and export power station under the Mmamabula Energy Project.

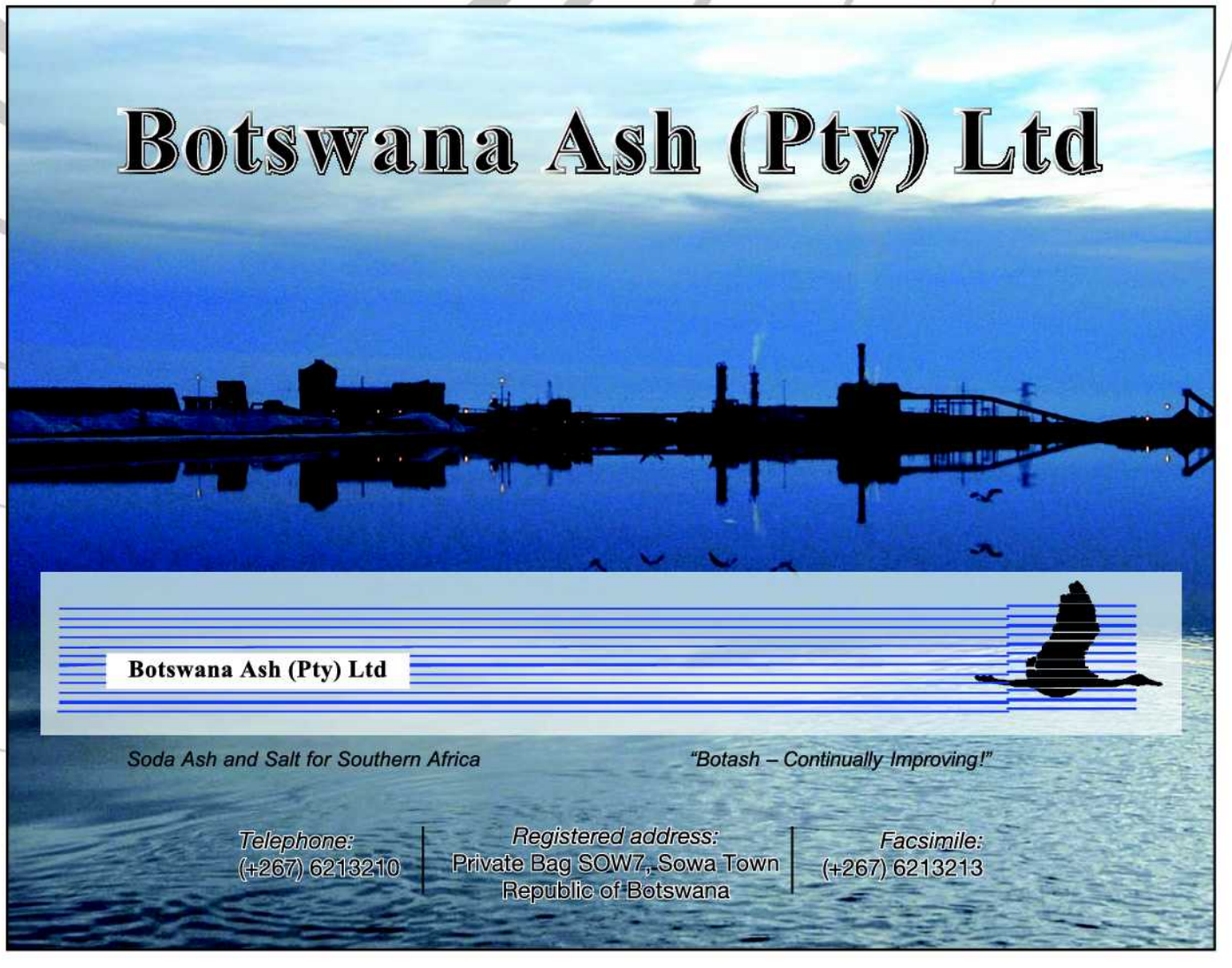
Aviva Corporation has identified a large coal resource of 1.3 billion tonnes at Mmamantswe, which could see the development of the coal deposit and building of a power station. Mmamantswe is favourably situated, with rail, power and highway links to Gaborone (just 70 kilometres away) and South Africa passing within 30 kilometres of the deposit.

Both the Mmamantswe and Mmamabula projects are currently on hold pending the release of South Africa's key energy plan, which will set the framework for private power investment.

GOLD

Botswana has gold deposits in the Francistown region, with gold having been mined at Mupane since November 2004. The Mupane Mine produces gold bullion which is refined by Rand Refinery Limited in South Africa. The main product recovered from the refinery is gold with silver as a by-product.

Owned by Canadian gold-miner Iamgold, Mupane changed from contractor to owner mining in 2008, lowering costs considerably. As of 31 December 2009, the Mupane operation had proven and probable mineral reserves of 205 000 contained ounces, which can be extracted in a period of around five years. The company plans to continue evaluating mining costs to determine the feasibility of developing additional resources to extend the mine life beyond this date.



TOURISM INDUSTRY

The tourism industry has been identified as an alternative source of economic growth and diversification, particularly due to its interaction with other sectors in the economy. Furthermore, tourism has the potential to attract robust foreign investment and is a driving force for development in a broad range of industries.

Following a difficult 2009, during which revenues in the travel and tourism sector were dampened worldwide by the global recession, the situation improved significantly in 2010. According to Mr Paul Malin, the head of the European Union delegation based in

One of the world's top wildlife destinations, Botswana's pristine wilderness environments encompass the wetlands of the Okavango Delta, the vast Kalahari Desert and the elephant herds of the Chobe National Park.



TOURISTS VIEWING GAME

© Ulf Nermark/Acti

Gaborone, Botswana is among the top ten African countries whose tourism industries recorded positive growth of 5 percent and more between 2008/09 and 2009/10, with 2.1 million tourist arrivals in the country over this period.

The 2010 World Travel and Tourism Council (WTTC) report estimates real Gross Domestic Product (GDP) growth for Botswana's travel and tourism economy to rise to 6.7 percent in 2010/11 and to average 6 percent per annum over the subsequent ten years. As tourism is well integrated into many different economic sectors, it is expected that the industry's real contribution for the year will be around P8.77 billion – 8.5 percent of projected 2010/11 GDP.

Other WTTC projections put direct employment in the travel and tourism industry at 26 000 in 2010/11. However, through it linkages with associated sectors, indirect contribution to employment is expected to be closer to 54 000 jobs, which translates to 10.3 percent of total employment.

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FAVOURABLE LONG-TERM GROWTH PREDICTED

According to WTTC estimates, out of 181 countries worldwide, Botswana's travel and tourism economy is ranked number 115 in absolute size, 92 in relative contribution to the national economy and 42 in predicted long-term (ten-year) growth.

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Furthermore, in the World Economic Forum's Travel & Tourism Competitiveness Report of 2009, Botswana moved up by eight places, from 87 to 79 out of 133 countries. The same report ranked the country 34th in terms of natural resources owing to its rich fauna and lack of environmental damage, with a high proportion of its national land protected (13th position).

According to the competitiveness report, Botswana also benefits from excellent price competitiveness, where it comes in 9th place as a result of low ticket taxes and airport charges, a favourable tax regime, and generally low prices overall. In addition, the country saw a marked improvement in the measured prioritisation of the tourism sector between 2008 and 2009, with significantly higher government expenditure on the sector and heightened presence at international tourism fairs.

Nevertheless, there remain some areas which need to be improved if Botswana is to grow its tourism product further. Present challenges include bureaucratic delays, restrictive bilateral air service agreements, insufficiently developed transport infrastructure, low hotel room concentration, a limited presence of international car rental companies and relatively few Automated Teller Machines.

As such, present investments are being directed to airports and tourism accommodation facilities, as well as toward the raising of service standards to match those of other world famous tourism destinations. Sir Seretse Khama International, Kasane, Maun and Francistown airports are being upgraded during NDP 10.

The Ministry of Environment, Wildlife and Tourism has entered into an agreement with the Ministry of Lands and Housing to establish a tourism land bank, which should improve the business environment for tourism growth by readily availing land for development. Consideration is also being given to the establishment of a one-stop point of entry for prospective investors in the tourism sector, where they will be able to submit business proposals and be directed to the relevant authorities.

To enhance participation by Batswana, some activities in the tourism industry have been reserved for citizens only, such as the provision of lodging facilities and B&Bs and tour guide services. Some public campsites in the protected areas have also been leased out to citizen companies, and out of the 11 lodge sites awarded to four Botswana-registered companies, three were operational by early 2010.

Global tourism award

At the World Travel and Tourism Council (WTTC) Global Travel and Tourism Summit, held in Beijing, China in May 2010, Botswana, through the Okavango Delta Ramsar Site (ODRS), won the Destination Stewardship award of the Tourism for Tomorrow Awards. The award is conferred in recognition of a destination, country or region with a network of tourism enterprises and organisations that show dedication to and success in maintaining a programme of sustainable tourism management. The ODRS is a unique wetlands area rich in game, and includes the Tsodilo Hills (a UNESCO World Heritage Site) and Moremi Game Reserve, as well as wildlife management areas and community lands.

Delta Guest House



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TOURISM POLICY & LEGISLATION

Botswana's 'high value – low volume' tourism model has served the country well in the past 20 years, both in terms of generating tourist numbers and preserving the unspoiled nature of the country's tourism product. The strategy avoids an excessive number of tourists in a given tourist area through the judicious use of price (evident in park entry and camping fees and the high price of concessions) and the assurance of quality, offering a unique experience without compromising the integrity of the resource.

This policy has, however, been found to be restrictive. The Tourism Master Plan of May 2000 recommended a modified 'high volume – mixed price' strategy, which would enable potential tourists to choose from a wider variety of affordable tourism products within the country.

The Tourism Policy of 1990 has therefore been reviewed to align it with current developments within the sector as well as with industry best practices. Amendments are also being made to the Tourism Act of 1992 and the Botswana Tourism Board Act. Institutional structures are being examined and tourism product diversification promoted, with the emphasis on cultural and heritage tourism. It is believed that product diversification will help to broaden the tourism base and spread tourism to additional geographical regions, thereby increasing citizen and community participation and, consequently, employment creation and income.

THE TOURISM INDUSTRY

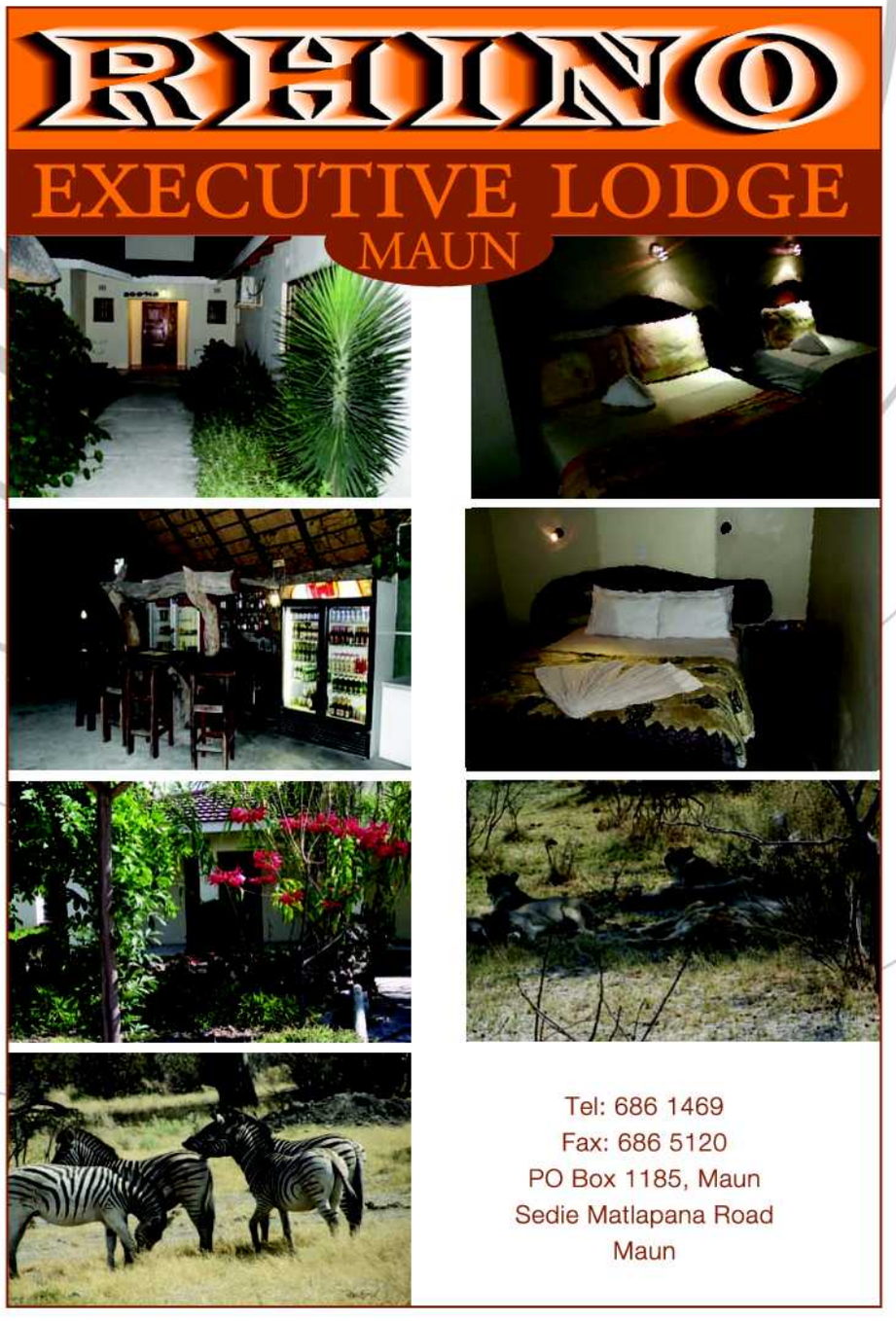
Developing the tourism industry is the mandate of the Ministry of Environment, Wildlife and Tourism, which is responsible for not only the overall coordination of policies and strategies, but also the implementation of programmes, projects and activities that are aimed at protecting the environment and conserving natural resources while promoting their sustainable use through tourism and other non-consumptive and consumptive uses.

The ministry oversees growth in the sector through the Botswana Tourism Board (BTB) and regulates the industry through the Department of Tourism. Infrastructure in the national parks and game reserves falls under the Department of Wildlife and National Parks, while Botswana's cultural heritage is managed by the Department of National Monuments and Museums.

The Botswana Tourism Board works to achieve a globally competitive tourism sector, and is responsible for a number of operational functions, such as marketing, investment promotion and grading of tourism facilities. Its broad mandate includes creating awareness of Botswana in the international arena; promoting and positioning Botswana's tourism products and services; providing market access for local industry players and facilitating contact with international tourism suppliers; and conducting market research and analysis.

Key activities undertaken by the Botswana Tourism Board and Department of Tourism include:

- *Ecotourism* – development of the tourism product and facilitation of meaningful participation by local communities, while ensuring that such endeavours are environmentally sustainable.
- *Marketing* – promotion and marketing initiatives have intensified to enhance the competitive advantage of Botswana as a premier tourist destination. International marketing representatives have been appointed in major source markets such as Germany, the United Kingdom and the United States. The BTB participates in major international and regional tourism promotional events, such as the INDABA in Durban, South Africa, and the World Travel Market (WTM) in London, with the latter considered the world's premier travel industry event.
- *Quality Assurance* – grading and classification of tourist facilities and development of grading standards for other sectors; for example, mobile safaris and conference facilities.
- *Research and Statistics* – the Tourism Satellite Account (TSA) quantifies all aspects of travel and tourism, from personal consumption to business purchases, capital investment, government spending and exports. It then translates this information into economic measures of production, such as GDP and employment.
- *Licensing and Inspection* – the Department



of Tourism continues to inspect and license tourist enterprises. Prior to licensing of enterprises, an inspection is carried out to ensure compliance with tourism regulations.

- *Tourism training levy* – to upgrade skills of frontline staff in the tourism industry, with the fund managed by a committee comprising members from the public and private sectors. A hospitality training school of international standard is to be established in partnership with the private sector.

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Formed in 1982, the privately established and funded Hospitality and Tourism Association of Botswana (HATAB) represents all sectors of the industry in promoting, encouraging and policing excellence in hospitality and tourism in Botswana. The association's voluntary membership now includes more than 40 percent of all registered and operating tourism enterprises in the country.

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Marketing and promotion

The Botswana Tourism Board is also involved in event-based marketing strategies. In recent years, these have included the Toyota 1000-kilometre Desert Race and the release of the film and TV version of the No.1 Ladies' Detective Agency, which is based on the series of books of the same name by Alexander McCall Smith.

Botswana has also teamed up with developers of famous reality TV shows such as Big Brother to showcase the wonders of the local tourism product to other countries. Television shows produced in Botswana are broadcast to many European TV stations, thereby targeting some of the country's tourism source markets as well as increasing awareness of the country as a tourist destination.

In further efforts to promote Botswana's tourism product, BTB sponsored the making of the film 'Living with Big Cats', which was screened for the first time in early 2010. The documentary was produced by two renowned conservationists, Dereck and Beverly Joubert, who are also pioneers of the Big Cats Initiative along with the National Geographic Society.

On the local front, domestic marketing with special emphasis on short breaks and weekend packages will be increased during NDP 10 to encourage Batswana to explore their own country. Concessionary rates for citizens (which already exist in reduced entry fees to national parks) will be introduced and marketed to promote domestic tourism.



Infrastructural development

With tourism having traditionally focused on the Okavango Delta and wildlife, new lodge sites are also being developed in the southern, central and western parts of the country to promote tourism in these formerly undeveloped areas. During NDP 9, 18 new sites for tourist lodges were identified at various locations within the national parks and forestry reserves, including the Chobe Forest Reserve, Makgadikgadi and Nxai Pans Park, Central Kalahari Game Reserve and the Kgalagadi Transfrontier Park. A total of 11 lodge sites have been awarded, four to local companies.

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Due to the eco-sensitivity of the prime tourism destinations of the Okavango Delta and Chobe National Park, developments have had to take into account the carrying capacity of these pristine locations, with a 'high value – low volume' tourism approach adopted.

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In addition, 39 existing camp sites in the country's national parks and game reserves are being privatised, with some having been put to tender. While privatisation may not add to the existing inventory of facilities, it is anticipated that those facilities managed by the private sector will be of a better standard, thereby contributing to an increase in visitor arrivals.

Since 2003, the number of citizen-owned establishments has been increasing due to the reservation of certain accommodation types (such as guesthouses) for 100 percent citizen-owned companies. Bed and breakfast facilities and guesthouses cater for both domestic and regional markets, low budget international tourists in transit to tourist attraction areas, and conference attendees.

As recommended in the World Travel and Tourism Council's 2007 study on Botswana's tourism industry, the country's tourism base is being diversified and expanded countrywide. Tourist attractions such as culture and heritage sites are being developed and management plans drawn up, with local communities to benefit from the development of these facilities. Focus on these alternative tourism products is also helping to reduce overcrowding in national parks and game reserves.

A comprehensive Monument Development Plan has been put in place, and 20 monuments

have been selected for development. In line with the 'Adopt a Monument' strategy, the ministry has secured funding from De Beers Botswana to the tune of P1 600 000 for the ongoing Gcwihaba Caves project, which is exploring the geological, archaeological and tourism potential of the caves.

DIVERSIFYING TOURISM

Botswana has a huge variety of tourism products that need to be developed and marketed to diversify the country's economy. The tourism industry is currently predominantly based on wildlife and wilderness, whose concentration is in the northern part of the country. This presents great potential for diversification into other products, such as cultural and heritage tourism.

To expand cultural and heritage tourism during NDP 10, community based initiatives will be strongly supported so that local communities become more involved in the travel and tourism industry. Such communities will be encouraged to utilise natural resources in their areas and to be fully involved in the development and promotion of cultural tourism.

Through their direct involvement in the tourism industry – by venturing into tourism-related projects as well as finding employment in tourism enterprises – local communities will gain a greater appreciation of tourism as a concept and the conservation of natural resources. However, there is need for a deliberate policy effort to intensify skills development for tourism industry personnel and build the capacity of community-based organisations that participate in tourism.

Ecotourism

Ecotourism encompasses not only the traditional wildlife and wilderness elements of the tourism product, but also cultural, historical, archaeological and natural attractions as well as recreational tourism. In addition to delivering a quality experience to tourists, ecotourism should educate both visitors and local communities about the importance of conserving natural and cultural resources.

A National Ecotourism Strategy has been developed to support product diversification. It aims to help attract a segment of the tourism market with significant growth potential; raise the profile of the country as a tourism destination; generate resources for conservation; provide an incentive for the sustainable utilisation of natural resources; generate renewed pride in local cultures; and facilitate and reward responsible tourism planning and management practices.

The aim of the Community Based Natural Resources Management (CBNRM) Policy of 2007 is to provide a platform for conservation-based development which should facilitate protection of biodiversity and ecosystems while improving rural livelihoods and reducing poverty through sustainable natural resource use. Community Based Organisations (CBOs) have been established for the sustainable utilisation of wildlife, veld products and heritage sites as part of the implementation of the CBNRM programme. Joint ventures between local and foreign tourism entrepreneurs are strongly encouraged.

The majority of successful CBNRM projects include a combination of the following tourism components:

- ***Trophy hunting*** – Community based organisations are allocated a concession area giving them exclusive rights over the wildlife quota and commercial tourism operations. The community can manage wildlife for subsistence hunting or the quota can be sold to a private sector partner. Trophy hunting joint venture agreements generate large sums of money for communities and significant employment during the hunting season.
- ***Photographic nature-based safaris*** – The hunting tourism infrastructure is used during the non-hunting season for photographic safaris, with community-managed concession areas usually organised and managed by the joint venture partner.
- ***Culture and handicrafts*** – Fees for traditional dancing, storytelling, guided hunting and gathering trips are in most cases paid directly to the participants, and the revenue from crafts sold usually returns to the producer.
- ***Overnight accommodation*** – This is provided along main roads or in scenic areas, with tourists offered a range of services at community campsites such as guided tours, cultural attractions and crafts.

The current focus is on improving community-based income generating activities, as well as the construction of the national cultural village at Toutswe Mogala and miniature cultural villages in Okavango, Chobe, Kgalagadi, Tswapong and South Central regions with assistance from the private sector. Other developments in the offing include the creation of a culture development fund and the construction of

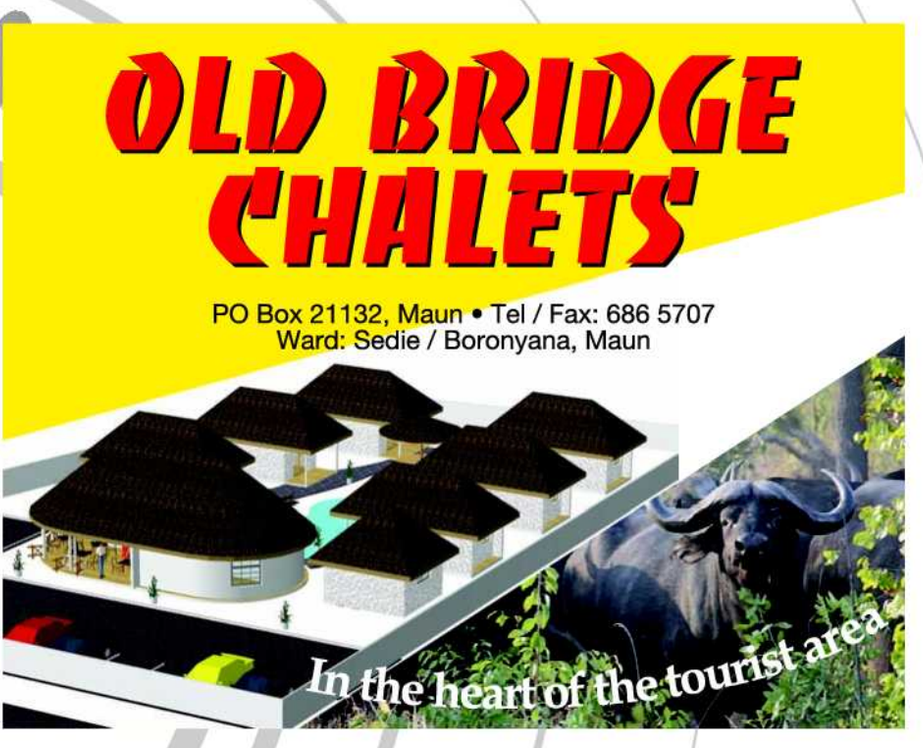


a State Theatre in Gaborone for research and promotion of culture.

New projects for NDP 10

New initiatives to be undertaken during NDP 10 include:

- Development and implementation of opportunities around Gaborone Dam
- No.1 Ladies' Detective Agency packaging (including construction of the film set and upgrading of other sites mentioned in the book)
- Implementation of Molema and Gcwihaba management/infrastructural plans
- Expansion of the Moremi Gorge project to include Manowe Gorge
- Research, identification and commercialisation of commercial heritage sites
- Rollout of the Ecotourism (Camel) Project to other locations
- Development of standards for mobile safaris and camp sites, cultural villages, conference facilities and restaurants
- Establishment of the Eco-certification Council to assist in ensuring that identified projects are ecotourism compliant
- Development of a brand manual, photo library, virtual website tours and a tourism call centre to assist with marketing
- Establishment of information offices at Mamuno, Tlokweng, Ramatlabama, Ramokgwebana, Kazungula, Pioneer and Ngoma Border Posts



CONSERVATION

Botswana shelters some of the last true wilderness areas in the world, with around 38 percent of the country reserved for conservation purposes. Wildlife resources and their habitats are protected as the foundation on which the tourism industry has been built. It is essential that these natural assets are managed on a sustainable basis and the environment is maintained in its natural and pristine state.

Managing wildlife resources

The sustainable management of natural resources requires finding a compromise between Botswana's conservation requirements and the needs of those who rely on such resources for a living. The ongoing environmental economics programme is expected to promote the valuation of natural resources by placing a monetary value on such resources.

Evolving complexities of wildlife conservation, management and legislation are being addressed through the revision of the Wildlife Conservation Policy (1986) and the Wildlife Conservation and National Parks Act of 1992. The revised Wildlife Conservation Policy is being finalised and is expected to be presented to parliament during 2010/11 financial year.

The incursion of predators and other wildlife onto farms and community areas is a matter of concern, especially in the case of livestock farming. Minimising conflict between wildlife and humans is undertaken in accord with the objectives of sustainable land and natural resource use while continuing to advance the country's conservation efforts. The Predator Management Strategy and the Elephant Management Policy are intended to provide a plan of action in this regard.

Elephant and predator management strategies have focused on the construction of fences to provide a physical barrier between wildlife conservation areas and settlements or farming areas as well as allowing open wildlife corridors. Other strategies comprise the reduction of elephants in agricultural zones and the elimination of problem animals where necessary.

The provision of boreholes in protected areas to increase watering points helps to disperse the wildlife population as well as keeping it away from communal areas. Satellite tracking systems have been used to monitor the movement of lions in areas adjacent to Khutse Game Reserve and the eastern part of the Central Kgalagadi Game Reserve. In addition, chilli has been used in Ngamiland, Central and Chobe districts to deter elephants.

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Botswana has won a 2010 International Fund for Animal Welfare (IFAW) Interpol Eco-message award for its outstanding efforts in combating international wildlife crime. The country was awarded for consistency and compliance in supplying information which formed the database of wildlife crime trends.

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The Problem Animal Control Unit manages the incursion of wildlife into areas of habitation and also trains rural communities in problem animal control techniques. Compensation is paid to farmers for damage caused by predators, including wild dogs and cheetah, although the restriction on the killing of cheetah remains in place.

The Ministry of Environment, Wildlife and Tourism, in partnership with the World Bank, is to implement the Human Wildlife Coexistence Project in parts of Boteti, Ngamiland and Chobe districts during NDP 10. The main objective of the project is to reduce human-wildlife conflict incidences in those areas through the use of preventive strategies.

Plant and forest resources

The spotlight is on regulating the sustainable use of natural plant resources to ensure that Botswana conserves the ecological integrity and biodiversity of its floral resources. The Agricultural Resources Conservation Regulations require those harvesting veld products for commercial purposes to obtain a permit, allowing government to monitor and regulate annual off-takes and ensure that the nation benefits through resource user fees while guarding against unlawful harvesting.

In addition, concerted efforts are being made to conserve and regenerate Botswana's valuable but ever-diminishing forests and woodlands. Major problems include the collection of firewood around settlements and along main roads, as well as overgrazing. Natural phenomena such as drought and fire also play a role.

The Tropical Forest Conservation Fund established in 2007 with assistance from the US government supports the conservation, protection, restoration and sustainable management of forest resources. The Accelerated Tree Planting Programme entails the planting of indigenous tree species in schools, rehabilitation of degraded areas and production of educational and awareness materials.

Presently, three pieces of legislation – the Forest Act, Agricultural Resources Conservation (Veld Products) Act and Herbage Preservation Act – are being merged to produce one Forest Act, which should be presented to parliament during the 2010/11 financial year. Furthermore, the National Wild Land Fire Management Policy and Strategy intended to provide a framework for an integrated wildfire management approach are being developed.

Environmental issues

Botswana's key environmental issues include depletion of water resources, rangeland degradation and desertification, overuse of woodland resources and veld products, declining numbers of some species, sanitation and waste management (particularly pollution of land, water and air).

The Environmental Impact Assessment (EIA) Act of 2005 was approved during NDP 9. In line with this, a number of improvements are being initiated, such as the formulation of the EIA Practitioners' Association. This will provide fundamental measures of monitoring, controlling and regulating administrative, financial and ethical practices within the profession.

An Environmental Management Activities Project has been developed, which includes environmental, economic and natural resources accounting, persistent organic pollutants phasing-out activities, the management plan for the Makgadikgadi Wetland System, support to NGOs and completion of activities under the Africa Environment Information Network (AEIN) project. The National Environmental Education Strategy and Action Plan (NEESAP) was published in 2008.

Climate change

Speaking at the International Centre for Theoretical Physics (ICTP) Africa conference on developing countries' vulnerability to climate change in April 2010, the Minister of Environment, Wildlife and Tourism, Mr Kitso Mokaila, stated that his ministry is to oversee the preparation of a long-term mitigation and adaptation strategy as part of Botswana's concerted response to climate change.

As such, all committees that have been involved with climate change issues are being reorganised. The new structure comprises key stakeholders, including the private and public sectors, and will oversee the development of a policy and programmes to cope with climate vulnerabilities.

NATIONAL PARKS & GAME RESERVES

National parks and game reserves make up more than 17 percent of Botswana's total area, while Wildlife Management Areas (WMAs) cover a further 21 percent of the land surrounding these areas. Located mostly in the north and west, game viewing opportunities are focused around lodges, camps and mobile safari operations. Accommodation ranges from campgrounds and modest camps within national parks and game reserves to ultra-luxurious lodges and safari accommodation, with hotels on the fringes of some protected areas.

The best game viewing can be had in the dry winter months from May to October, when wildlife gathers around water sources and the vegetation is sparse. The rainy summer months between November and April offer excellent bird watching, and there are often special tourism packages available at this time of year. While Botswana has a good national road network, with roads between all major centres tarred, access roads leading to game reserves and many of the tracks within protected areas require the use of 4x4 vehicles.

Activities for visitors include tours and safaris catering for diverse interests such as bird watching, fishing, photography and hunting. There are mobile safaris in comfortable game viewing vehicles, guided walking safaris and 'mokoro' safaris, with the latter taking place in a traditional dugout canoe. Safaris can also be undertaken on horseback – or elephant-back for the more adventurous. A 'fly-in' safari in a light aircraft to the various camps is a popular option.

The Okavango Delta

The Okavango Delta is one of the world's largest inland deltas, covering an area of some 15 000 square kilometres. Listed as 'A Wetland of International Importance', the Okavango is Botswana's single greatest potential asset in terms of tourism, and although attracting thousands of visitors every year, the delta has managed to remain relatively unspoilt by man.

Forming an oasis within the vast Kgalagadi Desert, the Okavango consists of a network of waterways linking lagoons, floodplains and islands which contains the greatest concentration of vegetation types in southern Africa outside of the Cape fynbos region. In addition to marsh, river and open grassland areas, there are shady riverine forests of palms and towering trees.

A wide range of habitats provides food and water for large numbers of mammals, fish and reptiles, and few other places in the world have so many varieties of wild creatures in such proximity. A fisherman's paradise, the delta is also renowned for its birdlife, which includes some of the most elusive and exotic in the world.

The Okavango is part of a much larger network which includes the Moremi Game Reserve (covering a third of the delta), Lake Ngami, the Mababe Depression (Savuti) in the Chobe National Park, and the Makgadikgadi and Nxai pans.

National parks

The ***Chobe National Park*** in northern Botswana covers 10 566 square kilometres

where one of the greatest concentrations of game on the African continent can be found. In addition to buffalo, hippo and kudu, Chobe is renowned for its huge herds of elephants which, numbering an estimated 60 000, are thought to make up the largest elephant population in the world. The Park comprises the distinct ecosystems of 'Serondela', consisting of lush plains and dense forests in the north-eastern Chobe River area; the savannah and woodlands of 'Savuti' in the west, which supports large numbers of animals such as lion, elephants and hyena; the floodplains of 'Linyati' in the north-west, linking Chobe to the Okavango Delta; and the 'Mababe' depression and the dry hinterland in between.

With Kasane International Airport situated nearby, Chobe is the most developed of Botswana's protected areas, and contains a range of accommodation as well as a safari experience of a lifetime. Wildlife and bird viewing is best between May and September, when the banks of the Chobe River teem with thousands of elephants which congregate here to drink and bathe during the dry winter months. During the rainy season vast herds of zebra can be seen migrating from the Linyanti swamps to the Savuti grasslands.

South of Chobe, the vast and unspoilt ***Makgadikgadi and Nxai Pans National Park*** comprise fossil pans and flat grass plains which provide grazing for herds of springbok, zebra and impala. It is believed that the salt pans and plains of the southern section were once the site of an ancient lake that covered central Botswana.

During the rainy season these pans are transformed into shimmering lakes which provide the perfect habitat for thousands of pink flamingos and a source of water for the herds of wild animals which come here to drink. An impressive group of trees known as Baines Baobabs may be found on the edge of the small Kudiakam Pan. The safest and most convenient way of seeing this area is with an organised safari.

The ***Kgalagadi Transfrontier Park*** in the south-west Kgalagadi is a single unit created through the merging of Botswana's Gemsbok National Park (28 440 square kilometres) with the adjacent Kalahari Gemsbok National Park (9 591 square kilometres) in South Africa. The size of the park allows for two ecological processes that were once widespread in the savannahs and grasslands of Africa – the large-scale migration of wild ungulates and predation by large mammalian carnivores. The park contains predators such as lion (including the distinctive black-mane Kalahari lion), cheetah and leopard as well as numerous antelope, and game viewing is recommended between July and September. It is also well known for the Nossob fossil river valley.

Transfrontier Conservation areas

Transfrontier conservation areas (TFCAs) play an important role in the survival of wildlife populations that are contiguous across international borders. They are also focal points for private sector investment, generating economic benefits for local communities in remote areas, and are useful in regional packaging of tourist attractions.

The TFCA Strategy for 2010 and beyond was endorsed by nine Southern African Development Community (SADC) countries in 2005. This formal cooperation with other countries brings a significant exchange of experiences and promotes regional understanding and tolerance.

Launched in May 2000, the Kgalagadi Transfrontier Park was the first TFCA in Africa. Two other TFCAs affecting Botswana are presently under development:

- The ***Kavango-Zambezi (KAZA) TFCA*** is situated in the Okavango and Zambezi river basins where the borders of Angola, Botswana, Namibia, Zambia and Zimbabwe converge. It is set to become the world's biggest conservation area and will eventually span an area of approximately 287 132 square kilometres, which is almost the size of Italy. It will comprise 36 national parks, game reserves, community conservancies and game management areas. Most notably, the area will include the Caprivi Strip, Chobe National Park, the Okavango Delta (the largest Ramsar Site in the World) and the Victoria Falls (a World Heritage Site and one of the Seven Natural Wonders of the World). KAZA will also have the largest contiguous population of African elephant (approximately 250 000) on the continent.
- The ***Greater Mapungubwe TFCA*** is situated at the confluence of the Limpopo and Shashe Rivers, encompassing areas in Botswana, South Africa and Zimbabwe. The proposed TFCA will include the Botswana Northern Tuli Game Reserve; the Mapungubwe National Park, as well as various privately owned ranches in South Africa; and the Tuli Circle Safari Area, Sentinel Ranch, Nottingham Estate, Maramani Communal Land and Machachuta, Masera and River Ranch Resettlement Areas in Zimbabwe. The area is renowned for its rich biodiversity and scenic beauty, not to mention the cultural importance of the archaeological treasures of Mapungubwe. It also supports populations of big game, including the famous Tuli elephants and all major predators.

Game reserves

Considered to be one of the best and most beautiful game reserves in Africa, the ***Moremi Game Reserve*** is situated north-east of Maun and covers about one-third of the Okavango Delta. Moremi has a great diversity of habitats, consisting of 'mophane' woodland and acacia forests as well as the floodplains and lagoons of the delta. Elephants are numerous, as are other wildlife species such as rhino, lion, giraffe and leopard. Wild dog, which are under threat in other areas, are regularly sighted here and are the subject of a research project which has been run in the area since 1989. Game viewing is at its best between July and October when wildlife converges on the Xakanaxa Lagoon, Khwai River and Third Bridge.

The beautiful Tuli Block in eastern Botswana is a region rich in wildlife and interesting landscapes. Devoted to conservation, the privately owned ***Mashatu Game Reserve*** is located here at the confluence of the Limpopo and Shashe rivers. Covering approximately 30 000 hectares, the reserve is named after the Mashatu tree, which is only found in the valleys of the Limpopo and Zambezi. The wide open grasslands are marked by large rock formations from which the surrounding plains can be viewed. Wildlife includes the largest elephant population on privately owned land in Africa, as well as zebra, wildebeest, cheetah and lion. The reserve offers cycling, walking and horseback safaris, as well as adventure tourism and archaeological tours. It is also a good place to see Africa's famous baobab trees.

While smaller than Mashatu, the ***Tuli Game Reserve*** boasts a fascinating landscape of striking red-hued rock formations and lush vegetation bordering the meandering Limpopo River.

The ancient and semi-arid desert of the Kgalagadi, meaning 'land of thirst', covers about three-quarters of western Botswana. Home to the Basarwa (also known as the 'San'

or Bushmen) for probably thousands of years, the Kgalagadi is characterised by vast landscapes, windblown sand dunes, salt pans, shrubs and open grasslands. While rainfall is sporadic, varying from 170 to 700 millimetres per year, spring and summer showers transform the desert's sandy plains, carpeting them in flowers and grass. There are also spectacular acacia woodlands in the western parts of the Kgalagadi.

Covering a region of stark beauty and expansive vistas, the 52 800 square-kilometre ***Central Kgalagadi Game Reserve*** is the second largest game reserve in the world. Along with giraffe, black-mane lion, leopard, cheetah, wild dog and hyena, herds of African antelope – such as kudu, eland, wildebeest and red hartebeest – can be seen among the desert shrubs and trees of the vast savannah, while bird watching includes some impressive raptors as well as interesting migrants.

Climatic transformation over the millennia has wrought fascinating geological formations such as the fossilised Okwa River, which once fed Lake Makgadikgadi and now forms an extensive valley in the southern part of the reserve. The Central Kgalagadi is best visited between December and April, when wildlife gathers in the valleys.

To the south, the ***Khutse Game Reserve*** is characterised by natural mineral pans and dry savannah, with large herds of gemsbok and hartebeest as well as predators such as lion and leopard. The pan complex is an excellent spot for game viewing. The reserve attracts many local visitors due to its proximity to Gaborone, 210 kilometres away.

While small in size, the 600-hectare ***Gaborone Game Reserve*** is nevertheless one of the most frequently visited in the country, with facilities including a visitor's education centre, picnic sites, and game and bird viewing hides overlooking a wetland area. There is a good network of roads for game viewing, with wildebeest, eland, springbok, zebra, kudu and ostrich to be seen amidst habitats such as riverine forest, thorn bush and wetland.

The small and hilly ***Manyelanong Game Reserve*** is located in Otse village near Lobatse, and contains one of the largest breeding colonies of Cape vultures, which are an endangered species.

Conservation areas

A community wildlife trust under the patronage of President Seretse Ian Khama, the 4 800-hectare ***Khama Rhino Sanctuary*** near Serowe was set up in 1992 to facilitate the repopulation of white rhino and the reintroduction black rhino in Botswana through the Department of Wildlife and National Parks. A unique example of the natural resources of the sandveld/hardveld area on the edge of the Kgalagadi Desert, the sanctuary started of with four white rhinos and now has 30 white and four black rhinos. The sanctuary provides excellent feeding and living conditions for the rhinos as well as other grazers, browsers, birds and wildlife, and includes over 30 species of mammals, such as cheetah, jackal, leopard, hyena, giraffe and hartebeest, and more than 230 species of birds. There are guided nature drives and trails, as well as chalets, a restaurant with a cocktail bar, an environmental education centre and a number of campsites. (Tel 463 0712)

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The Khama Rhino Sanctuary is set to expand, with an additional 4 200 hectares to be incorporated west of the game farm. This will bring its total area to 8 500 hectares and increase its carrying capacity to 70 white rhinos and 12 black rhinos.

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Just 10 kilometres south-east of Gaborone, ***Mokolodi Nature Reserve*** is a private reserve managed by the Mokolodi Wildlife Foundation, a registered charity which is dedicated to wildlife preservation and environmental education. The park was established in 1994 as a 3 000-hectare conservation area and stocked with many species of wildlife, including white rhino, cheetah, giraffe, zebra, sable and elephant, which joined the indigenous game such as kudu, hyena, leopard and waterbuck. Mokolodi is involved in cheetah conservation and has an animal sanctuary and wildlife clinic, a martial eagle flight cage and a team of hand reared African elephants. Horseback or mountain bike safaris are offered. Amenities include accommodation in secluded chalets and campsites, a magnificent conference centre and restaurant. (Tel +267 316 1955/6 or 316 1542 or visit www.mokolodi.com)

The ***Nata Bird Sanctuary*** is a wildlife refuge situated near Nata village on the north-eastern border of Sowa Pan. There are over 165 species of birds, such as eagle, bustard, kingfisher and (when flooded) flamingos and pelicans, as well as a variety of antelope.

CULTURE & HERITAGE

In addition to its rich wildlife resource, Botswana possesses a diversity of natural, historical and cultural attractions. These include unique geological formations, an excellent collection of Basarwa (San) rock art and a number of locations where traditional arts and crafts can be found.

On the edge of the Kgalagadi in north-western Botswana the remote and mysterious ***Tsodilo Hills*** – or 'mountains of the gods' – are the site of one of the most historically significant rock art sites in the world with a magnificent collection of prehistoric art portraying animal life, human figures and geometric designs. The hills are accorded great spiritual significance by the Basarwa, who are believed to have inhabited this site for millennia, and the Hambukushu. Now a World Heritage site, this important archaeological attraction boasts over 4 500 identified rock paintings dating to around 650 AD.

The Tsodilo Site Museum ensures that the pristine nature of the site is preserved and its unique paintings and animal and plant species protected. The museum hosts educational programmes and conducts guided tours to rock art sites, while researching and promoting the cultures of the Hambukushu and the !Kung communities.

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With a history which dates back some 20 000 years, the Basarwa – also known as the Bushmen or 'San' – are one of the world's oldest cultures. Their presence in Botswana attracts an ever-increasing number of international visitors, with activities such as traditional dancing, story-telling, and guided hunting and gathering trips on offer.

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Situated in the Gcwihaba Hills in northwest Botswana, the ***Gcwihaba Caves*** (also known as Drotsky's Caves) are an important attraction, consisting of winding passages and glorious stalagmite and stalactite formations in glistening white flowstone.

Fossil beaches, fascinating artefacts and ruins dating from the 6th century are to be found at Lekhubu Island, a rocky outcrop rising above Sua Pan, which was once a vast inland sea.

The strikingly rugged wilderness area known as the ***Tuli Block*** in eastern Botswana contains rock art and a number of archaeological sites, with tools dating from the early Stone Age. At one time thought to be the location of King Solomon's Mines due to the mineral richness of the area, the 30 metre high basalt cliffs of ***Solomon's Wall*** are a remarkable feature made by an ancient dyke whose rock buttress once formed a natural dam and waterfall across the Motloutse River.

(continued on page 162)

AGRICULTURE

The agricultural sector in Botswana has two major components: livestock and arable production, with livestock farming accounting for around four-fifths of agricultural output. Agricultural production is based on the traditional, subsistence-oriented systems, with limited commercial activities for both crops and livestock.

Crop production centres mainly on rain-fed farming, and is dominated by small traditional farms, with an average size of five hectares. About 63 000 arable farms fit into this category; only 112 farms are larger than 150 hectares.

As many Batswana derive their livelihood from agriculture and related activities, any positive improvements in productivity within this sector will help to enhance economic growth and alleviate poverty.



CATTLE AT LIVESTOCK AUCTION

© IFC/World Bank/Arnaque

The main livestock species are cattle, small stock (goats and sheep) and poultry, with populations of about 2 to 2.5 million, 1.5 million and 31 million, respectively. Livestock populations have fluctuated over time due to high mortality caused by recurring drought, pests and diseases.

In addition to adverse factors such as variable rainfall and outbreaks of animal diseases, production continues to be undermined by the slow pace of improvement in farming technologies and practices (particularly in the case of small-scale farmers), lack of basic infrastructure and access to markets, and difficulties in accessing long-term credit.

Despite these challenges, there is potential for increasing the sector's contribution to Botswana's Gross Domestic Product (GDP), to help alleviate poverty, create employment and improve food security at the household level. The central role played by agriculture in the lives of Batswana has become even more important in view of the difficult economic conditions which have been experienced both locally and globally.

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About 70 percent of rural households derive part of their livelihood from agriculture.

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Completed in 2009, the comprehensive review of the agricultural sector is being used to inform the review of the National Policy on Agriculture. Although the policy objectives identified in 1991 are still relevant today, in an effort to transform Botswana's economy, attention is to be given to intensified research on new crop varieties, small machinery for use by farming households, harvesting and post-harvesting activities. Emphasis will also be placed on marketing and development of commodity value chains in order to secure and sustain market access.

At present, only 17 percent of farmers have access to power, 22 percent to telecommunications, 45 percent to roads (primary, tertiary and all weather) and 64 percent to agricultural water. These four main services have been identified as critical for increasing productivity in the agricultural sector. As such, a comprehensive agricultural infrastructure development strategy and action plan has been prepared for implementation during National Development Plan 10 (NDP 10).

Current trends in agriculture

In the mid-1960s agriculture was at the heart of Botswana's economy, with a 40 percent share in the country's GDP and employing 27 percent of labour in the formal sector. By 1988, its contribution to both GDP and formal sector employment had declined to about 4 percent, according to the National Policy on Agricultural Development (1991). By 2008/09, contribution to GDP had fallen to 1.9 percent.

The agricultural sector grew by 7.2 percent in 2008/09, following growth of 7.7 percent in 2007/08. The livestock subsector (which is dominated by beef production) is responsible for 80 percent of agricultural output.

Government aims to make the country self-sufficient in food production. Except for beef and poultry, Botswana is currently a net importer of most agricultural products, importing about 80 percent of its cereal requirements and 65 percent of its horticultural requirements.

AGRICULTURAL DEVELOPMENT

The focus of the sector during National Development Plan 9 (NDP 9) included diversification of the agricultural base, with horticultural production, forestry, beekeeping, dairy production, ostrich and game farming and bushveld products complementing traditional rain-fed agriculture and livestock farming. NDP 9 also prioritised the provision of basic infrastructure such as roads, electricity, water, serviced land and telecommunications in order to enhance development and make farms and markets more accessible.

In order to realise the goal of sustainable agricultural development, the acquisition of scarce skills and capital through foreign investment in the sector is essential. Food production must be increased at the least possible cost, and ways found to transform farms into viable businesses. Investments need to be made in research and technology, as well as more innovative production, processing and marketing of agricultural commodities. The challenge in implementing government programmes is to ensure that costs remain manageable while continuing to foster conditions for increased agricultural production.

Commercialising and diversifying agriculture

An Agricultural Hub has been established with the objective of commercialising the agricultural sector and diversifying it through viable, self-sustaining agricultural enterprises and projects. The Hub operates in conjunction with the Ministry of Agriculture, and interacts with other hubs, ministries, parastatals, the private sector and other organisations. With a number of development programmes under its control, the hub facilitates the timely implementation of projects and initiatives, and has been empowered to recommend, negotiate, intervene and, if necessary, do away with red tape.

Agriculture is a key sector identified in the 'Botswana Excellence – Strategy for Economic Diversification and Sustainable Growth' developed by the Business and Economic Advisory Council (BEAC), with the focus on:

- ***Commercialising and Restructuring/ Rebuilding the Livestock Sector*** – With the main aim of rebuilding the livestock sector as a pillar of economic activity and employment, systematically co-ordinated efforts are being made to convert the cattle industry from traditional farming to commercially driven, substantially weaner-based production. This involves the introduction of appropriate grading and pricing structures, government support in the area of training for commercial farming, making available sufficient breeding stock and start-up financing, and the provision of an improved transport infrastructure. As such, concerted efforts are being made to improve the operational and marketing efficiency of the Botswana Meat Commission.
- ***High Value Agricultural Crops*** – Experience has been gained in large-scale flower farming and related projects. In the light of its significant employment generating effect and export potential, the future expansion of intensive farming projects is being given high priority and provided with strong support by government.
- ***Agro-industrial Projects*** – Government supports projects in agro-industry as they have the potential to bring about meaningful economic diversification – including the important geographical diversification of economic activity – and create a new export platform as well as bring high quality, quasi-industrial activity

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BOTSWANA VACCINE INSTITUTE

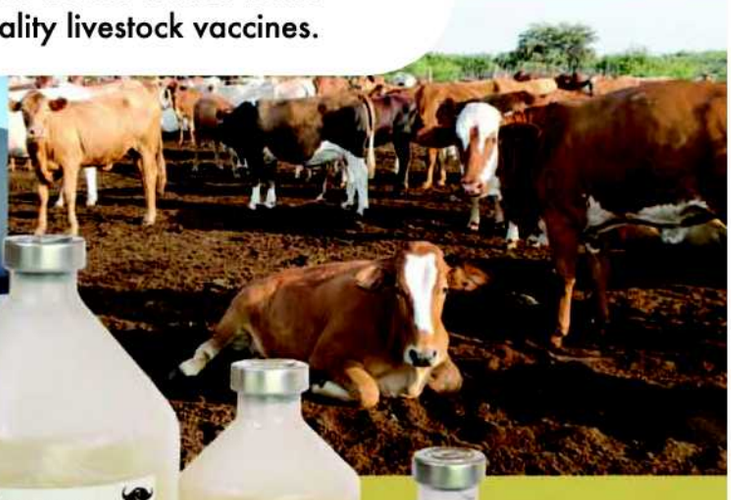




VISION

BVI is committed to be the leader in the production of quality livestock vaccines.







"Providing Sustainable Animal Health Solutions"

to relatively poor rural areas. Support to agro-industrial projects comprises the provision of infrastructure and ancillary facilities, removal of regulatory obstacles and introduction of appropriate incentives.

Furthermore, to increase access to land by potential investors, efforts are being made to identify unutilised agricultural land for leasing to investors. By 2010, about 15 000 hectares of unutilised agricultural land had been identified in the Southern District, and a total of 16 state farms had been leased to both local and foreign investors in an effort to commercialise agriculture.

The ***National Master Plan for Arable Agriculture and Dairy Development (NAMPAADD)*** was created in order to commercialise rain-fed and irrigated arable agricultural production as well as dairy farming through technology transfer and the development of extension services. NAMPAADD has a ten-year implementation horizon, divided into three phases.

Phase I of the programme entailed setting up Pilot Training Farms (PTFs) for on-farm training of extension workers and farmers, as well as the provision of business advisory services. PTFs have been established at Ramatlabama for rain-fed agriculture, Glen Valley and Dikabeya for irrigated agriculture, and Sunnyside for dairy farming. NAMPAADD Phase II, which involved putting these pilot projects into operation, ended on 30 November 2007.

A review of the first two phases of NAMPAADD has indicated capacity development is needed, with the support of experts with hands-on experience, as well as a more commercial approach through the provision of seed money. As such, NAMPAADD is to operate on a semi-autonomous basis to demonstrate the profitability and sustainability of farming without government support.

Implementation of Phase III, which will run until 2012, will therefore focus on demonstrating modern farming technologies to existing and potential farmers to promote a more commercialised and diversified agricultural sector. The programme will encourage commercial farming methods to increase local production of milk, cereals, vegetables and fruits. Farmers will also be assisted in the utilisation of current entrepreneurial development programmes as well as those which offer financial support.

Agricultural machinery, equipment and staff housing will be procured to support the PTFs established during NDP 9. PTFs will be upgraded to Farmer Service Centres and their role expanded to include provision of services (such as machinery hire, sale of feed, fertiliser, seeds, herbicides, etc) to farmers at affordable prices to fast-track the commercialisation process. To this end, staff accommodation will be built at Sunnyside Dairy PTF, which runs a 24-hour shift. Other activities include expansion of heifer and calving sheds to maximise the use of the current facility, and the equipping of BW-OSSCA to become a fully fledged service centre.

Currently under development, the ***Zambezi Integrated Agro-Commercial Development Project*** in Pandamatenga covers both infrastructural and agro-commercial development. It is envisaged that the private sector will provide funds for agro-commercial activities such as fisheries, poultry, field crops, vegetables and oil plants, while government will invest in infrastructure, mainly for water conveyance from the Chobe-Zambezi River system to the project site for irrigation.

The use of water for irrigation from the Chobe-Zambezi River system will be governed by the Zambezi River Basin Commission Agreement, which has been signed with neighbouring riparian states. The Ministry of Minerals, Energy and Water Resources is therefore carrying out an environmental impact assessment and feasibility study on the transfer of water from this system.

Support schemes and financial assistance

The Arable Lands Development Programme (ALDEP) has been phased out and replaced with the ***Integrated Support Programme for Arable Agriculture Development (ISPAAD)*** during the 2008/09 cropping season. ISPAAD aims to increase grain production, promote food security at household and national level, commercialise agriculture through mechanisation and improve extension outreach through the provision of subsidised inputs and services such as fencing, seeds, fertilisers and potable water, the facilitation of access to credit and the establishment of Agricultural Service Centres. Some 4 550 farmers were assisted with ploughing and planting in the 2009/10 cropping season.

ISPAAD, which was initially tailored for crop producers, has been revised and its benefits extended to horticultural production. This is in order to maximise production and reduce reliance on imports, with Botswana currently importing most of its vegetables and fruits from neighbouring countries, particularly South Africa. Farmers are also helped with negotiating pre-contract agreements between themselves and buyers that guarantee the farmer a certain price before production starts, thereby avoiding the risk of price escalation.

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To facilitate the implementation of ISPAAD, government has signed a Memorandum of Agreement with the National Development Bank (NDB) for the provision of seasonal loans at the prime lending rate.

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Support to livestock farmers formerly offered under Services to Livestock Owners in Communal Areas (SLOCA) and the Livestock Water Development Programme (LWDP) is now offered through the ***Livestock Management and Infrastructure Development (LIMID) project.***

The Citizen Entrepreneurial Development Agency (CEDA) ***Young Farmers' Fund*** was designed to encourage young people to venture into agricultural projects. The fund offers Batswana aged between 18 and 35, particularly those who have studied agriculture, improved access to finance at concessional rates as well as entrepreneurial training and monitoring and mentoring services to ensure that they are sufficiently resourced and equipped to run agricultural businesses.

In September 2008 CEDA launched the ***Arable Seasonal Loan (Ipelege)***, which provides loans of up to P500 000 for dry land farming projects. In its first year of operation, a total of 386 applications valued at P77 million were received, out of which 77 applications valued at P11.8 million were approved.

To mitigate the associated risks, beneficiaries are encouraged to subscribe to the ***Agricultural Credit Guarantee Scheme (ACGS)***, which sees government, through the National Development Bank (NDB), guaranteeing rain-red crop farming loans to a maximum of 85 percent of the year's instalment in the event of a declared drought. The actual amount paid

BOTSWANA HORTICULTURAL MARKET



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Botswana's One Stop Fresh Produce Centre

We are registered as Marekisetso A Morogo Wa Rona (Pty) Ltd, t/a Botswana Horticultural Market (BHM). It is a company jointly owned by Botswana Development Corporation and Botswana Horticultural Council.

The company is controlled by a Board of Directors made up of representatives from BDC, BHC, Ministry of Agriculture, traders and market agents. The market trading commenced on 6 November 2008.The initiative is part of the broader Government objective of boosting local horticultural production and citizen empowerment.

Botswana Horticultural Market is a commission market where producers deliver their produce to Market Agents who then sell the produce to buyers. The market makes a 5% non-negotiable commission on the selling of all fresh produce, while Market Agents earn a negotiable 7.5% commission on the selling price of all produce. The market receives a fixed 5% commission for managing and maintaining a competitive marketing system and infrastructure that makes produce trading possible, including a computerised sales system, cash collections, cleaning and security. In addition to the market agents, the market introduced wholesalers on the market floor cash particularly from the smallholders. The market is regulated through a Code of Conduct enforced by market management.

The market therefore serves as a point of distribution where local horticultural producers send their produce for sale by independent marker agents directly to wholesalers, retailers and the public. It is important to note that all produce in a commission market remains the property of the producer until sold, via a market agent, to willing buyers. The market never owns the produce, and neither do the agents.

Trading Hours

Sales

Monday - Friday	06:00 - 13:00
Saturday	06:00 - 12:30

Receiving Times

Monday - Friday	06:00 - 19:30
Saturday	06:00 - 12:00
Sunday	13:30 - 19:30

Market Agents

BHM has two market agents:

Farmer's Fresh Produce
Mr Nic van Zyl
Tel: (+267) 3682544/32
Cell: (+267) 71441204

Fresh (Pty) Ltd
Ms Anita Van der Nat
Tel: (+267) 3682546/33
Cell: (+267) 71392623

Location and facilities

BHM is the largest of its kind in the country, and is located in Broadhurst Industrial Area, Gaborone. The market can easily be accessed from the western by-pass freeway and Magochanyama Road.

The market hall with a floor space of 9 800 m^2 and a capacity for 3 600 tonnes of produce, is utilized for vegetables, fruits, potatoes and onions. As value-added services, there are processing and re-packaging facilities and three cold rooms which can accommodate 320 pallets of fresh produce. Above all, BHM has adopted a 'one-stop fresh produce centre' principle where there are businesses dealing with a variety of goods other than fresh fruits and vegetables to satisfy the needs of the customer, such as: wholesale and retailing in poultry meat, eggs, beef, farm inputs, packaging materials as well as a cafeteria and ample parking space.

Consignment Control

For easier tracking of produce delivered to the market, all consignments are captured into the sales processing system and each consignment allocated a control number which tracks its movement within the market until sold and paid. Producers are paid within five days after completion of consignment.

Pricing

BHM is both a place of price determination of products sold and a distribution point for fresh produce. The price is determined by the availability of produce for sale and how much produce buyers demand for purchase, with the quality of the produce playing an important role. As an important product of the market's trading system, some established fresh produce traders use the market prices to determine their daily prices.

Produce Comparison

The opportunity to compare fresh produce and prices is only available at BHM because of the number of producers who send fresh produce to the market. Producers are able to compare their products to those of other farmers, thereby keeping abreast of the latest trends and developments on the industry. Likewise, buyers are able to compare the quality of goods on display at any specific time.

Buying

Transactions are all handled via a computerised smart card debit system provided by the market. To purchase at the market, buyers first purchase a smart buying card from the cashiers' office. The buyer then deposits a chosen amount into the card. One can clear the balance of your card at the end of each trading day, or the balance may be left on the card for purchasing at a later date. The market draws a diversity of buyers from around the country as far as Shakawe in Northwest District. Though still new, a significant number of buyers from South Africa, Namibia, Zambia and Zimbabwe have shown interest in buying at the market.

depends on the severity of drought in a particular locality. The farmer and NDB pay a premium of 5 percent each for the instalment falling due in that year.

The NDB and Botswana Agricultural Marketing Board (BAMB) signed a Memorandum of Agreement during 2009 to facilitate seasonal loans for arable agriculture, particularly farmers who are under contract for specified crops. As the credit facilitator, NDB will provide the funds in the form of seasonal loans to participating farmers, while BAMB will, during the harvest period, purchase produce from the farmers and forward payment to NDB. Determining factors for eligibility include: type of crop to be planted, yield and basis for loan requirement.

Agricultural cooperatives

In order to facilitate food production and citizen economic empowerment, the Ministry of Agriculture is working to ensure that agricultural cooperatives are autonomous, diversified and self-sustaining by 2016. The Agricultural Management Association (AMA) Act provides for: the registration of AMAs and liquidation of poorly performing ones; the creation of a helpful legal environment for small groups of farmers to effectively compete in the market; and the audit and inspection of AMAs to control abuse and misappropriation.

LIVESTOCK FARMING

Livestock farming is the industry's principal subsector, contributing about 80 percent to agricultural output, as well as being an essential component of the rural economy. Permanent pastures make up a large proportion of Botswana's total land area, and cattle-farming is vital to the subsistence of around a quarter of all rural households. The subsector is also linked to other income generating activities such as manufacturing, processing, retailing and services delivery.

Beef is the main subsector, with production of other non-cattle livestock contributing minimally to the national food requirements. Small stock and pig production contribute 2 percent and 20 percent respectively, while ostrich production is almost nonexistent. Dairy production is still in its infancy, with dairy products (fresh milk, milk powder and other products) contributing only 3 percent of the national requirements.

The past decade has been a challenging one for the cattle and beef subsector owing to persistent droughts, overgrazing, low producer prices and increased operational costs, with productivity indicators such as off-take and carcass Cold Dressed Mass (CDM) lower than other Southern African Development Community (SADC) countries. Botswana's farming system, which has a large communal component compared to the commercial systems predominating in neighbouring countries, is a major contributory factor.

Livestock reform and diversification

The study undertaken in 2005 on the Viability and Long Term Development Strategy for the Livestock (Beef) Subsector in Botswana recommended concerted reform in order to strengthen efficiency in processing and marketing, improve incentives and land tenure arrangements, liberalise markets and restructure public expenditure. Reducing the excess regulatory burden, restructuring the Botswana Meat Commission and strengthening production support systems were identified as the key elements to bring about these reforms.

The study also proposed that the traditional oxen production system, in which oxen and cows are raised on ranches and sold to abattoirs when mature, be replaced with a weaner production system, which has the potential to increase throughput to 600 000 slaughter cattle annually, increasing livestock off-take from 10 to 20 percent. This entails selling male calves as soon as they are weaned to feedlots where they are fed intensively for a few months before being sold to an abattoir.

In this regard, supportive legislation includes the Livestock and Meat Industries Act of 2007 which consolidates the licensing and inspection of local and export red meat and poultry abattoirs, slaughter slabs and other meat processing plants under one authority. This ensures that the quality of meat consumed within the country is equivalent to that which is exported. In the past the control, supervision and inspection of abattoirs was spread between the Ministry of Agriculture, councils and the private sector.

The stud breeding initiative has been made possible through the Livestock Improvement Act of 2009, which is aimed at promoting the formation of breeder's societies locally as well as monitoring the utilisation, management and preservation of animal genetic resources. The Livestock Performance Testing and Recording Scheme will be established to improve the productivity of livestock by identifying the best performing animals. The act will also enable private sector investment in the establishment of semen collection centres, embryo transfer and artificial insemination services. Currently, government is the only provider of these services.

Diversification is seen as another method of initiating growth, with agricultural production moving into areas such as ostrich farming, hides, skins and pelts, in addition to beef production. Projects have aimed to improve and increase the marketability and quality of hides and skins coming from small producers.

While small stock plays a pivotal role in the lives of many Batswana, the sheep and goat numbers have declined dramatically in the past two decades. From 2 624 000 goats and 337 000 sheep in 1995, there were just 817 000 goats and 145 000 sheep by 2004. Much of this may be attributed to poor management, lack of disease control, and poor nutrition and breeding practices. As a result, the import of lamb and mutton has continued to rise. For NDP 10, the commercialisation of the small stock industry is receiving greater attention, and the formation of a national small stock producers association is being looked at.

Botswana Meat Commission

The Botswana Meat Commission (BMC) was established by government in 1966 to coordinate the production of beef from a national herd of some 2 to 3 million. This has entailed purchasing livestock as well as processing and marketing meat and other animal products. BMC has been the country's sole exporter of lean beef, and its products have featured prominently in markets throughout the world.

Facilities at the BMC headquarters in Lobatse consist of an abattoir as well as canning and by-products plants to handle a throughput of 800 cattle and 500 small stock per day. The branch abattoirs are situated in Maun and at Francistown. Attempts are being made to sell the BMC abattoir at Maun, which has been closed for a number of years.

Developments in the meat industry, both locally and globally, saw BMC being tested by a number of emerging challenges, ranging from increased international competition and high costs to declining cattle throughput and producer dissatisfaction with prices. In order to deal with these obstacles, BMC underwent a strategic review, the recommendations of which are presently being implemented.

In order to focus on its core business, BMC has disposed of a number of its subsidiaries, as well as trimming its workforce. Furthermore, to facilitate the uptake of weaner production and encourage farmers to engage in cattle farming on a large scale, the commission is offering farmers a more competitive price for their livestock. The commission is offering large-scale feedlot businesses advanced credit, which is payable when cattle have been sold. Furthermore, a standard feedlotting contract has been developed to assist farmers in dealing with feedlotters.

The issue of BMC's monopoly, which consists of privileged quota access to the European Union (EU) market, is still being resolved. The BMC Review recommended that the commission prepare itself to operate and succeed in an open market environment, as its monopoly status had led to inefficiency as well as high costs. Amendments are thus being made to the Botswana Meat Commission (BMC) Act.

The BMC ran at a loss during 2009. From a throughput target of 172 000, BMC processed around 135 237 cattle. Production costs were higher than anticipated – P148 million against P112 million – as were non-production costs: about P85 million compared with a target of P52 million. However, farmers fetched the best prices ever, being paid 84 percent of revenue against a target of 66 percent.

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Botswana's cattle prices have increased dramatically since 2008 in comparison with other beef exporting countries.

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The export market

Over the years, Botswana has been able to maintain access to lucrative international beef markets, due to compliance with the sanitary and phytosanitary requirements of its export markets. One of the major constraints to increased livestock production and access to these markets is the threat of trans-boundary and wildlife-transmittable animal diseases, such as Foot and Mouth Disease (FMD).

Beef exports have, however, not reached the annual EU Cotonou Agreement quota that offers preferential access to EU markets for Botswana beef of 18 916 tonnes per annum. The average fulfilment in the last ten years has been 63 percent, the lowest being during 2006. This occurred despite efforts to improve herd quality by cross-breeding, which was promoted through subsidised artificial insemination. Changing consumer habits, unpredictable beef prices and the international trend towards free trade are other challenges.

The review of the BMC Act will pave the way for the selling of meat by individuals or syndicates for export. At the same time, the implementation of the new Livestock and Meat Industries Act will allow the private sector to establish abattoir facilities that comply with the act, thereby also helping to facilitate the export of meat. The identification of additional export opportunities – particularly in the SADC region – is also being explored.

Dairy industry

Botswana requires close to 48 million litres of milk annually, with local farmers only managing to produce 8 million litres per year and importing the balance from South Africa. The market for milk and milk by-products thus remains largely unexploited.

Lack of infrastructure in the form of roads and electricity is among the challenges facing dairy farmers. That milk production is highly capital intensive compounds the problem. Strategies arising from NAMPAADD aim to promote milk production through increasing the dairy herd size and adopting modern farm management techniques and marketing practices.

A minimum of 50 dairy cows is the recommended ideal herd size to give farmers a reasonable return to continue production and reduce milk imports. Furthermore, the output of Botswana's dairy cows could be increased substantially, from the current average of around 10 litres of milk per cow per day to between 50 and 60 litres. Proper feeding strategies and a regular supply of fresh water would also assist in boosting output.

Poultry industry

Poultry production in Botswana has developed to a level of self sufficiency in meat and table eggs. Predominantly undertaken by women, children and the elderly, poultry farming contributes to food security as well as rural employment and the diversification of the production base. However, only a few farmers enter this industry due to the high costs of production, feed and management of broilers and layers. There are opportunities for private sector investment in the running of hatcheries.

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A demonstration centre for indigenous poultry is being established in Kang, where good management practices will be demonstrated and breeding stock sold to farmers.

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While ostrich production provides an opportunity for diversification, it has experienced difficulties in the past, such as a low bird population due to unavailability of breeding stock and high feed costs. Government's Poultry Development Project has seen the development of the Dibete Ostrich Multiplication Unit (DOMU), which provides grower chicks to satellite farmers.

DOMU, which is run by the Department of Animal Production, has 1 433 birds (660 breeders, 415 juveniles and 358 chicks) on the farm, producing and selling chicks and growers/juveniles to farmers at subsidised prices. Eggs are hatched by a private business which provides the service for government on a chick sharing basis. Feed is the single largest cost in ostrich production, accounting for 70 to 80 percent of production costs.

Fisheries

Botswana produces around 150 tonnes of fish per annum, with about 80 percent of this coming from the Okavango aquatic system, where a fish stock assessment has been carried out. Fisheries regulations are being developed to ensure the sustainable utilisation of resources and address the conflict between commercial fishermen and recreational fishing operators.

Domestic fish production is augmented through aquaculture, which is diversifying the economy as well as providing alternative protein sources. The fish hatchery at Letsibogo Dam in Mmadinare is designed to produce over 450 000 fingerlings per annum to supply fish farmers and restock dams, as well as to provide support to the new three-year junior

certificate agricultural curriculum.

Animal health

The departments of Vet Services and Animal Production assist in livestock production by providing advisory and artificial insemination services, operating a diagnostic laboratory for disease control and carrying out meat inspections.

The viability of the Botswana beef industry has over the years been threatened by the outbreak of animal diseases and pests. Foot and Mouth Disease (FMD) remains a major threat to the beef industry, with nine outbreaks experienced over the past five years. While these are treated with intensive vaccination and other control measures, there nevertheless exists a need to reinforce the application of disease control and management strategies to effectively control and eradicate livestock diseases, including tsetse fly, through measures such as limiting animal movements.

Game-proof fences have been constructed in areas where weaknesses have been found, such as the Botswana/Zimbabwe border. The private sector is being involved through the outsourcing of activities such as the construction and maintenance of fences. The FMD Relief Fund is administered by the National Development Bank (NDB) and assists farmers who are unable to market their cattle as a result of the disease.

Regarding Bovine Spongiform Encephalopathy (BSE), regular verification tests to validate Botswana's BSE-free status are carried out, and regulations for testing and certification are constantly being improved upon. Botswana is also involved in a phased programme for regional tsetse intervention aimed at pushing back the frontiers of tsetse distribution beyond the tsetse fly belt. This is being implemented in collaboration with the (AU) Pan African Tsetse and Trypanosomiasis Eradication Campaign (PATTEC) and regional partners.

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The successful completion of the new FMD laboratory in 2010 will enable the Botswana Vaccine Institute to increase its vaccine production capacity. This will greatly assist in removing current technical barriers to trade and make it possible for more beef to be eligible for export to the EU. This move, coupled with the anticipated re-opening of the Maun abattoir, will result in increased throughput at the two abattoirs to a total of 250 000 cattle annually in 2011.

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The Livestock Identification and Trace-back System (LITS) project ensures that all cattle in Botswana are individually identified and traceable throughout their lives in compliance with the EU's regulatory procedures. Full traceability using the LITS system has been a mandatory requirement since April 2005, with movement permits, change of ownership, vaccinations and census taking for cattle being done strictly on the LITS platform. During 2010, the implementation of Livestock Identification Trace ability system was progressing well, with the highest number of cattle inserted since the rollout started and a total of 300 000 new boluses being procured.

Botswana Vaccine Institute

The Botswana Vaccine Institute (BVI) was established in 1978 as a project under the Veterinary Department of the Ministry of Agriculture to control outbreaks of FMD in northern Botswana. As the vaccine found markets within the SADC states, the successful project was transformed into a commercial business. Incorporated under the Company's Act in 1979, BVI Pty (Ltd) was established with 100 percent shareholding by the Botswana government.

The institute has ample capacity for vaccine production, FMD diagnosis and virus typing, research, safety and potency testing of its vaccines. In 1985 BVI was appointed a Regional Reference Laboratory for FMD in Sub-Saharan Africa for the Office International des Epizooties (OIE), the World Animal Health Organisation, and thus offers the following services to national veterinary authorities in Africa:

- Differential diagnosis of FMD
- Comparisons between field strains and vaccine subtypes
- Selection of appropriate vaccine strains
- Immunological monitoring of vaccinated animals

BVI maintains a stock of regional serotypes of FMD viruses, inactivated antigens of exotic types as well as appropriate hyper immune sera, and supplies the national laboratories on request. As an OIE reference laboratory for FMD, BVI also provides training and refresher courses in FMD diagnosis, epidemiological work and disease control. Research and epidemiological work are central to BVI, enabling the institute to respond to customers' requests for assistance during disease outbreak investigations and related activities.

Subsequent to technical cooperation with Merial, BVI has the capacity and technical competence to diversify animal vaccine production, with the following vaccines currently produced at the institute: Foot and Mouth Disease (SAT 1, SAT 2, SAT 3, O and A viruses); Normal Rinderpest and Thermo Stable Rinderpest (freeze dried); Anthrax; Black-quarter; Contagious Bovine Pleuropneumonia – CBPP (freeze dried); and Peste des Petits Ruminants (freeze dried).

All vaccines are manufactured to the highest international standards in accordance with Good Manufacturing Practices and Good Laboratory Practices, and in conformance with OIE as well as PANVAC (Pan African Veterinary Vaccine Centre) standards. The vaccines are sold locally (15 percent) as well as exported (85 percent) to SADC, other African countries, Asia and the Middle East.

The OIE and Botswana signed an agreement during 2006 on accreditation of OIE sub-regional representation for SADC, based in Gaborone. This will enable the region to become a hub not only for the monitoring and evaluation of compliance with international standards on animal health, food safety and animal welfare, but also for the development of surveillance, prevention and control of animal diseases in southern Africa.

The vaccine plant has been upgraded and expanded to double production capacity as well as improve the quality of vaccines. While this programme has been undertaken with assistance from the private sector, government retains majority shareholding in BVI because of the strategic nature of vaccine production to the livestock industry.

ARABLE FARMING

As a consequence of low and erratic rainfall and relatively poor soils, rain-fed arable production is predominantly a high risk activity characterised by low productivity. The production of cereal grains (mainly sorghum and maize) varies considerably from season to season, dependent almost entirely on rainfall. The annual mean production of 46 000 tonnes fluctuates between 8 200 and 175 000 tonnes. About 90 percent of Botswana's commercial crop output comes from farms in the Pandamatenga area, 675 kilometres north of

Gaborone, where sorghum, sunflower and other crops are grown.

There is a need to improve the performance of the arable subsector to reduce the high levels of food importation, rural-urban migration and poverty, as well as to enhance its potential to create employment. The majority of small-scale farmers lack the necessary inputs for increasing production and timely execution of farm operations. It is, therefore, important to assist them with essential implements and inputs, such as fertilisers and seed. Market access and facilities also need to be improved.

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IRRIGATION DEVELOPMENT

With the biggest challenge for crop production and diversification being inadequate water supply, the availability of treated waste water in major cities and villages provides a good opportunity for developing irrigation.

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With the production of cereal crops falling substantially below national requirements, it is hoped that the Integrated Support Programme for Arable Agriculture Development (ISPAAD), introduced in 2008, will improve yields and go some way towards assuring increased food security. Total crop production for the 2008/09 cropping season was 82 756 metric tonnes compared to 55 343 metric tonnes during 2007/08.

Diversification in horticultural production has seen the introduction of high value crops such as flowers, melons, herbs and cucurbits. However, land allocated for horticulture continues to be underutilised and the potential for this subsector remains largely untapped. National demand is currently estimated at about 75 000 metric tonnes per annum against the present production level of some 37 800 metric tonnes.

Challenges to production include the high cost and scarcity of production inputs, disorganised local markets, competition with products from outside the country, inadequate infrastructure to stimulate local production and lack of agricultural insurance schemes. While a horticultural market has been established in Gaborone, and horticultural projects are operating at Glen Valley and Dikabeya, these are not yet being fully utilised by farmers.

The Ministry of Agriculture is to spend over P75 million to improve the horticultural subsector during NDP 10. This includes the water development programme, which aims at establishing irrigation schemes with reliable water sources using both harvested rain and effluent water for horticulture and fodder production. The project components include a detailed design for the Zambezi Integrated Agro-Commercial Development Project, the establishment of an irrigation scheme at Lotsane Dam and the use of recycled effluent water resources from Francistown, Tonota, Palapye and Ghanzi sewer ponds.

Pandamatenga Agricultural Development Project

Government's strategy is to commercialise agriculture in areas of comparative advantage. Owing to its relatively high rainfall and fertile soils, Pandamatenga has shown enormous potential to produce cereal grains sufficient to meet the country's requirements. However, the area's clay soil and flat topography also makes it prone to flooding and difficult to access during the rainy season. As a result, its potential has not been fully realised.

The Pandamatenga Agricultural Development Project thus aims to create an enabling environment for farmers by constructing appropriate water control/drainage systems and access road networks. The total cost of the project is over P500 million, 87 percent of which is to be funded by the African Development Bank over a period of four years, with the balance being financed by government (P68 million) and the Pandamatenga Farmers' Association (P1 million). The project will benefit 266 farmers in the Pandamatenga area, comprising 245 subsistence farmers and 21 commercial farmers.

On completion, the project is expected to boost cereal production from 2.5 tonnes per hectare to 3.5 tonnes per hectare for commercial farmers and from 0.5 tonnes per hectare to 2.5 tonnes per hectare for traditional farming households. The project links with the development of agricultural service centres and the Zambezi Agro-Commercial project, and will involve the private sector in construction and maintenance of infrastructure.

Botswana Agricultural Marketing Board

The Botswana Agricultural Marketing Board (BAMB) is a public enterprise established by an act of parliament (No. 2 of 1974) and mandated to buy all scheduled produce from local producers while ensuring that adequate supplies exist for sale to customers at affordable prices. It is a one stop agricultural service centre, offering the following services to the farming community and customers alike: marketing (buying, packaging, processing and selling) locally produced grain pulses and beans, as well as providing a wide range of animal feeds and agricultural inputs.

Its broad functions include:

- Securing for producers and consumers alike a stable market for scheduled produce and ensuring efficient and fair distribution thereof throughout Botswana at prices that are, in all circumstances, equitable, avoiding any undue preference or advantage.
- Purchasing, distributing and marketing or selling scheduled produce, operating either as a wholesaler or retailer.
- Importing and exporting scheduled produce as well as arranging for the processing and sale of processed products.

Following completion of a turnaround strategy, BAMB has made a profit in two consecutive years. Business grew despite the economic slowdown, largely as a result of increased demand for inputs under the Integrated Programme for Arable Agriculture Development (ISPAAD), a growing demand for indigenous foods and the fact that in household expenditure the food component is usually the last to be adjusted when households tighten their budget. A net profit of about P14.7 million was recorded for the 2008/09 agricultural year – a four fold increase over the net profit of P3.5 million in the previous year.

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To ensure national food security, BAMB manages the Strategic Grain Reserve (SGR), which has been increased to 30 000 metric tonnes of sorghum, 30 000 metric tonnes of maize and 10 000 metric tonnes of pulses.

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AGRICULTURAL RESEARCH

The Ministry of Agriculture has for some time promoted and encouraged the adoption of improved agricultural production technologies through research, with significant achievements in crop and livestock

improvement and management practices. The results of these efforts are passed on to farmers, and include recommendations on improved varieties of arable and fodder crops, range and crop management practices, farm machinery, etc.

In the livestock subsector, research has demonstrated that the Tswana breed of cattle can be improved through selection for mature weight and fertility, and suitable beef cattle crossbreds have been identified for commercial beef production. A composite breed, a cross between indigenous and exotic breeds, has been successfully evaluated for performance under farm and feedlot conditions and demonstrated superiority compared to the Brahman and Tswana breeds.

Suitable diets for feedlot finishing beef cattle to improve weight gains, flushing Tswana breeding goats to enhance conception rates and improving pre- and post-weaning growth rates of Tswana kids, have been developed based on locally available feed resources. Suitable exotic fodder crops with high feed value, which can be utilised to augment deficient nutrients in native grasses during the dry season for grazing animals, have been evaluated. In addition, indigenous forage crops with high feed value have been identified and characterised. Mineral licks, which correct nutrient deficiencies in native grasses during both the wet and dry seasons, have also been developed to improve productivity of grazing animals.

A management guide on small stock production and a field guide on lablab forage production under variable rainfall regimes and soil types have been released to provide information on management of small stock and lablab production. A field guide on livestock breeds in Botswana has also been released to provide information on breeds and management systems

Furthermore, the department has adapted and evaluated a hay box as a simple tool for making hay by small scale farmers. Housing and calf rearing systems of dairy calves have also been adapted and evaluated for promoting calf production for small scale producers.

Suitable stocking rates for two agro-ecological zones, namely sand veld and hard veld, have been recommended for sustainable management and utilisation of rangelands. A grazing system has also been evaluated and recommended for sustainable beef cattle production.

Five indigenous livestock species (cattle, sheep, goats, pigs and chickens) adaptable to local conditions have been conserved for future utilisation. Descriptive physical, genetic characterisation of these species, including their DNA profiling, has been undertaken in order to provide information that can be utilised to exploit the potential of these animals for various market niches and guide conservation plans. In order to address diversification, livestock research has expanded to cover ostrich, poultry, pigs, dairy goats and beef cattle (cow/calf, weaner production and feedlot finishing).

Research on irrigation systems and plant population management for drought mitigation has demonstrated that efficient systems such as irrigation scheduling techniques and plant varieties suitable for Botswana do exist. Improved varieties of sorghum, pearl millet, groundnuts and mungbean have been released, along with recommendations on vegetable and fruit crop varieties. Suitable farm machinery for efficient seed drilling has also been developed and evaluated. Techniques for controlling 'cynodon dactolon' in crop production have been identified for utilisation by farmers to control weeds and improve crop production.

The Seed Multiplication Unit of the Department of Agricultural Research supports research in crop production. Seed of recommended crop varieties are multiplied and distributed to farmers. Seed multiplication is mainly done at Pandamatenga research farm to minimise seed shortages during drought years.

The Department of Agricultural Research, through the National Plant Genetic Resource Centre located at Sebele, is involved in the conservation of plant genetic resources. The centre currently holds over 3 000 species of plants, comprising mostly crops and their wild relatives. While the collection of germplasm continues, the current collection avails germplasm for research purposes in the country.

The Soil, Plant and Feed Analytical Laboratories of the department continue to provide analytical services on plant, soil and water for irrigation purposes and nutrient content to the farming community and other institutions. The analytical data produced by the laboratory assists farmers to diagnose and monitor nutritional status and plan the feeding and fertiliser requirements of their enterprises for increased agricultural productivity.

BAMB

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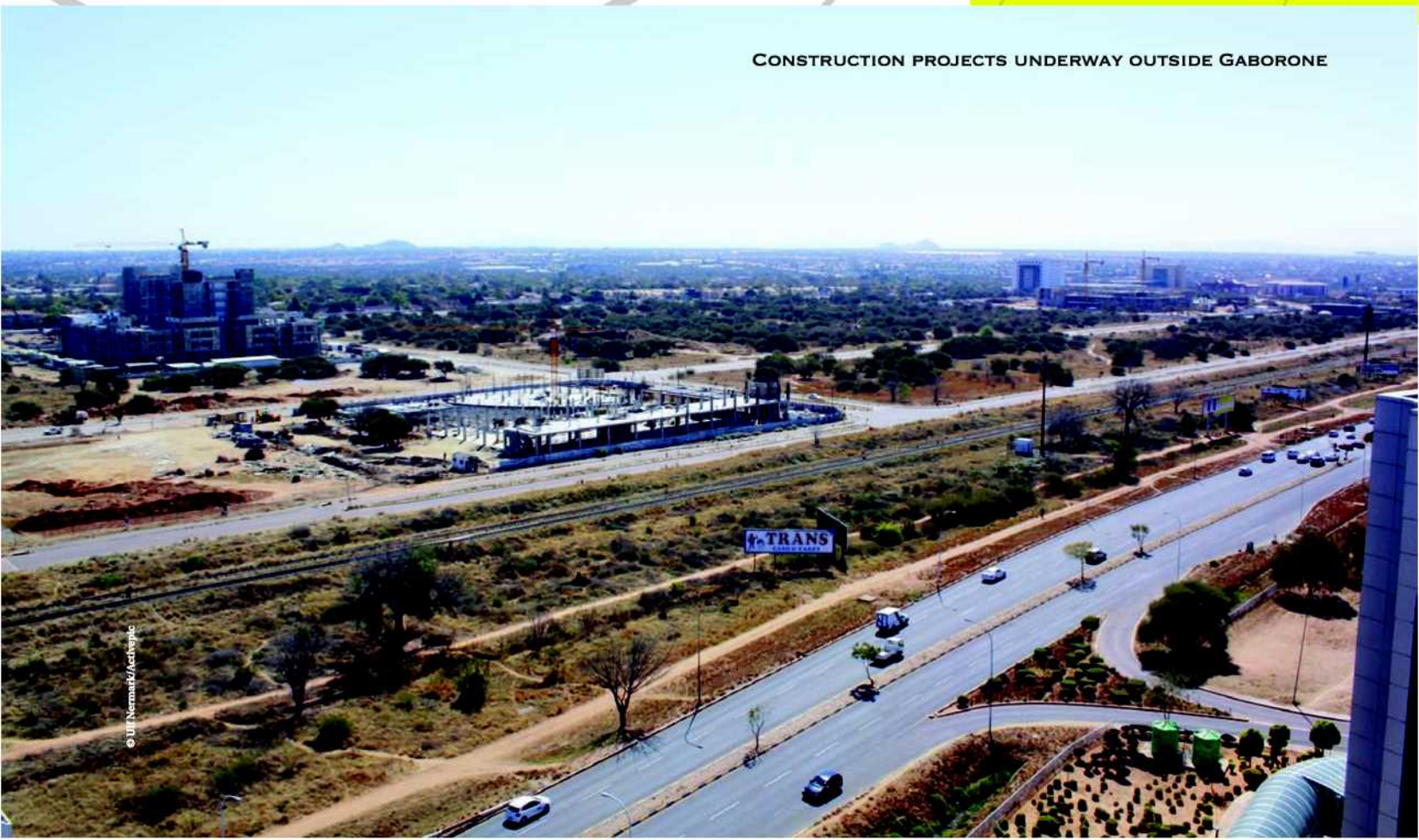
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PROPERTY DEVELOPMENT AND HOUSING

The provision of housing is vital to social transformation, while property and land development for commercial, industrial and residential markets is an essential element in unlocking economic growth.

The fast pace of urbanisation over the past decade has put increasing demand on the supply of housing. Meeting this demand is one of government's priorities, and the National Policy on Housing promotes housing as an instrument of both economic empowerment and poverty alleviation.

The country's largest urban residential property developer is the Botswana Housing Corporation (BHC), which is responsible for the provision of housing and acts as an agent for the development of urban serviced land. While government funds housing development programmes for low-income groups, non-governmental organisations (NGOs) also play a supportive role. The private sector has reoriented its traditional focus from



CONSTRUCTION PROJECTS UNDERWAY OUTSIDE GABORONE

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the provision of high-income housing to become more involved in government construction projects and housing schemes.

Applications for industrial, commercial and residential land are made to the Department of Lands and/or Land Boards. Residential, commercial and industrial property is available from the BHC, private property owners, real estate agents and the Botswana Development Corporation (BDC). Factory shells may be obtained from the Botswana Export Development and Investment Authority (BEDIA).

In the 2009 budget, the shortage of serviced land and delays taken in the allocation of land were cited as major constraints to investment in Botswana, particularly in areas such as tourism, industry and commerce, as well as residential property development. Government is thus employing a variety of new strategies to make land more readily available for development and housing.

Initiatives currently underway include a land servicing programme, which is covering urban as well as rural areas, and is expected to impact positively on investment opportunities across the country and help to enhance Botswana's global competitiveness. Furthermore, to facilitate speedy allocation of land to investors, land has been reserved for the ministries of Agriculture, Trade and Industry, and Environment, Wildlife and Tourism.

Private sector participation is crucial to augmenting these programmes, with land servicing to be funded by government only where there are no opportunities for public-private partnerships (PPPs). The private sector will also be given the opportunity to provide housing in areas where it has competitive advantage, while government will provide support in areas that are not commercially viable for the private sector, particularly rural and remote areas. These initiatives are aimed at facilitating citizen empowerment through local outsourcing as well as promoting the private sector as an engine of economic growth.

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Passed by parliament in 2010, the Industrial Property Act provides for the protection of industrial property in Botswana, thus giving effect to various international conventions, treaties and protocols to which the country is a party.

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THE PROPERTY MARKET

Despite the collapse of property markets in many developed nations in the wake of the global financial crisis, the property market in Botswana continues to perform relatively well. In the past decade, robust levels of economic growth have led to a corresponding expansion in both the commercial and residential property portfolios. The residential market followed suit, with property prices rising significantly, especially for higher-end homes.

Growth in the property market has been supported by Botswana's expanding middle class and the fact that home finance has become more readily available to the local market. Over the years, the establishment of a number of South African companies and multinationals in the country has resulted in an influx of foreigners which, when coupled with Botswana's relatively low interest rates compared with neighbouring South Africa, has stimulated the demand for property.

The introduction of sectional title, which is applicable to all types of land tenure in the country, is advantageous where shortages of land for housing exist, and is particularly suitable for the residential and commercial property market in urban areas such as Gaborone. It is expected that this will also stimulate the market as more people are able to buy flats.

While the process of registering a bond may still take up to three months, the

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computerisation of the Deeds and Registry office is seeing a decrease in delays. Capital gains from the disposal of immovable property is taxed at progressive rates, with the first P15 000 not taxable. Rental income is similarly taxed at progressive rates, from 5 percent to 25 percent.

The property market in Gaborone has experienced the strongest growth, with the construction of new residential developments as well as hotels, and investment in property on the rise. The largest demand for property has been seen at the lower end of the market, although there is a fair demand for medium-cost accommodation in middle class residential areas as well. In the upper segment of the market demand has increased by about 5 percent year on year. In 2009, the mini-series of the popular 'No.1 Ladies' Detective Agency' series of books set in Botswana, sparked foreign interest in Botswana's residential housing market, particularly in Gaborone, where properties went on the market for more than £200 000.

Current commercial developments show market resilience and optimism. Strategically located in the heart of the new Gaborone central business district (CBD), Masa Centre is being developed by BSE-listed RDC Properties. The centre has already attracted much interest as a home for multinational corporate and international retail brands, with the entire central retail space fully rented and demand for office space increasing. When fully complete in 2011, Masa Centre will house hotel and conference facilities, restaurants and boutiques, a casino, seven floors of worldclass offices, a cinema and open-air art gallery.

Also near the new CBD, Phase Two of the Fairgrounds Office Park and the SADC Headquarters have been completed. These projects were both developed by asset management company Botswana Insurance Fund Management (Bifm). A PPP development, the SADC Headquarters building is a major landmark on the Gaborone skyline.

CONSTRUCTION INDUSTRY

The construction sector has witnessed steady and significant growth in the past several years. This is consistent with the gradual acceleration of government expenditure over the same period. The expansionary fiscal stance taken by government to counteract the affects of the global financial downturn has also served to stimulate domestic demand, notably in the construction industry. The accelerated programme to develop additional public infrastructure, including construction of roads and dams and airport redevelopment, is being undertaken in the context of rapidly growing regional demand for construction and related services.

Historically, the sector has had a notable impact on Botswana's socioeconomic development through providing much-needed housing as well as factory and commercial space, and contributing to the nation's social and physical infrastructure through the building of roads, schools, hospitals, dams,

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sewerage and water treatment works. Despite a small formal domestic market, the industry has been a major player in employment creation as well as stimulating the building materials subsector. In recent years the construction sector has registered significant growth.

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RAPID GROWTH IN CONSTRUCTION

The construction sector grew by an impressive 15.9 percent during 2009.

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Optimum plot sizes and housing densities are kept under review, as are housing and building standards, and flexible building designs and technologies are continually being explored with the objective of improving the affordability of homes. Efforts are made to facilitate the production and use of local building materials at small-scale levels with a view to reducing costs.

The rapid pace of urbanisation and concomitant demand for housing has resulted in an increased scope for development in the indigenous construction industry and other related services. There has been demand for small and medium-scale local construction to develop urban and rural residential buildings and, in the longer term, to maintain them.



The Construction Industry Trust Fund (CITF) offers programmes for the development and training of artisans and craftsmen in the building and construction sector. A skills development institute aiming to bridge the gap in conventional training, CITF trains Batswana in the areas of bricklaying, plastering, tiling, plumbing, carpentry, civil, electrical and welding. Emphasis is placed on the acquisition of practical competencies through short-term modularised competency based training. Trained artisans are produced within a period of 4 to 12 weeks.

Government facilitates the entry of citizen contractors into the market and is addressing the disparity between citizen and foreign contractors. An enabling environment which allows contractors to acquire the necessary skills to become competitive is being created through various initiatives, such as breaking up projects into smaller parts to allow small-scale contractors to compete as well as assisting contractors with training in project execution.

All companies wishing to tender for government jobs must be registered with the Central Tender Board (CTB). Foreign investors must bring into Botswana a minimum investment, which varies according to the degree of citizen or foreign ownership of the company.

HOUSING

Located in the Ministry of Lands and Housing, the Department of Housing is a professional service department with responsibilities including the design and formulation of national housing policies, and monitoring and provision of guidance to local authorities, private developers and other institutions in the implementation of national housing programmes and related infrastructure projects.

In addition to the Botswana Housing Corporation, the following institutions also play a role in construction, property development and housing:

- The Botswana Building Society (BBS) – a specialist property financing institution providing finance for the purchase and construction of residential, commercial and industrial properties for both citizens and non-citizens
- The Botswana Export Development and Investment Authority (BEDIA) – develops factory buildings, helps investors find factory space and maintains a database of available factory shells

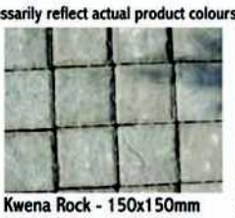


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BOBS

- The Botswana Development Corporation (BDC) – manages a property portfolio comprising four major sectors, residential, commercial, hotel and industrial, with the industrial sector accounting for the largest share of the portfolio by value

Botswana Housing Corporation

The Botswana Housing Corporation (BHC) is a parastatal responsible for the provision of housing throughout the country for public and private sector occupation. BHC builds houses predominantly in urban areas, and is actively involved in promoting home ownership by citizens. It has been a dominant player in the rental market in many urban areas, although it has in recent times begun to sell off significant numbers of its properties in Gaborone as a means of increasing individual home ownership. The corporation also acts as an agent of the government for the development of urban serviced land.

The majority of houses built are targeted for sale to Batswana on the open market, although where the return on investment is positive, the rental option is still considered. Currently, the corporation sells houses only on outright terms as the Tenant Purchase Scheme (TPS) has been suspended in order to address the accumulated arrears. Outright sales are encouraged through utilisation of available mortgage finance from institutions such as the BBS, commercial banks and employers' housing schemes.

BHC intends introducing a new instalment scheme in the near future which will be targeted at first time home buyers aged between 18 and 45, particularly those who are not attractive to financial institutions. Both sitting tenants as well as those presently not occupying BHC houses will be eligible for the scheme. To facilitate access to houses by those not currently occupying BHC houses, projects will be initiated specifically for the scheme.

During the 2008/09 financial year, BHC recorded a net profit of P158.3 million. The corporation's strategic plan for the years 2009-2016 anticipates the delivery of a total of 29 191 housing units, including projects carried out by third parties.

Integrated Development Consultancy

One of Botswana's leading property development consultants, the Integrated Development Consultancy (IDC) is the commercial arm of the Botswana Housing Corporation. With the core function of implementing construction projects, the consultancy comprises professionals in all the building professions – architecture, engineering and quantity surveying. Registered with the Central Tender Board, IDC offers pre- and post-contract services and is well equipped to carry out turn-key projects, undertaking work for both government and the private sector. Another primary concern is training Batswana in specialist core competencies so that they may in due course take up senior positions within the consultancy.

IDC operations focus on the following areas: capital development activities, primarily comprising housing development and related infrastructure development; development of prototype designs in order to provide affordable housing; provision of technical advice on capital development, including preliminary investigation, cost, etc; and promotion of citizen contractors by providing advice on technical matters.

HOUSING POLICIES & PROGRAMMES

The revised National Housing Policy guides housing policies and programmes, with government fostering an environment conducive to the construction of houses through favourable regulatory measures, affordable standards and delivery of serviced land. The Housing Policy Advisory Council coordinates the activities of the various stakeholders in housing delivery so as to smooth implementation of the housing policy.

The Ministry of Lands and Housing has been involved in the review and harmonisation of various land-related Acts, in particular those acts which pertain to land administration and



















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land access, and those related to housing delivery and access to housing. Government is also taking steps to create an enabling policy and programmatic environment for land use and development. The aim is to create synergies among various players such as financiers, developers and construction companies.

As such, acts being reviewed include the Tribal Land Act, Town and Country Planning Act, Land Survey Act, State Land Act and the Deeds Registry Act. A National Land Policy has also been drafted. Furthermore, government regulations concerning real estate practices were published in 2009.

Self Help Housing Agency

The Self Help Housing Agency (SHHA) programme is the most important avenue through which low and middle income households are able to access affordable plots and housing finance. Funds are allocated directly to councils for disbursement to SHHA applicants at subsidised interest rates.

The SHHA has had a huge impact in providing low-income households with better quality basic shelter, safe water, sanitation and secure tenure, thereby improving living conditions and promoting human dignity. As a result, a decision was taken in 2001 to roll out the scheme beyond the urban context.

The Turnkey Housing Delivery Scheme, where good quality houses are designed and built for occupation by SHHA beneficiaries, started on a pilot basis in Francistown in 2003. It was formalised in 2008 with the purpose of complementing the SHHA programme, and presently runs concurrently with the SHHA in order to assist beneficiaries wishing to undertake new construction.

The Turnkey scheme is useful in affording low income earners shelter, and it targets the P4 400 to P36 400 per annum income bracket. An additional requirement is that applicants have their own land plots at the time of application. The money for the scheme is disbursed centrally by the Ministry of Lands and Housing, through the Department of Housing, with disbursements given to city or town councils based on demand. Uptake of Turnkey benefits has been relatively slow, which is most likely due to the lack of publicity surrounding the programme.

In order to improve the operational efficiency and sustainability of the SHHA, a review of the programme was undertaken. Subsequently, under the new SHHA, the loan facility shall only be extended to qualifying beneficiaries for home extensions, improvements and/or completion. No loans will be disbursed for new developments or construction as this is catered for under the Turnkey component, which delivers complete and ready-to-occupy housing units.

The maximum SHHA loan amount has also been increased, from P20 000 to P45 000 for improvements, while Turnkey houses are being built for P60 000 per unit. The repayment period for both schemes is 20 years, and while no interest will be charged, defaulters will be charged a penalty fee of 10 percent. Those beneficiaries already on the SHHA programme and up to date with their repayments will also benefit from the zero percent interest on their loan with effect from the date of implementation of the revised programme. To date, a total of P19 380 850 has been disbursed to 697 beneficiaries.

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The SHHA has been the most successful low income housing programme undertaken in Botswana, accounting for about 52 percent of total housing provision and accommodating 62 percent of households in urban areas.

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Integrated Poverty Alleviation and Housing

The Poverty Alleviation and Housing Scheme, which integrates housing provision with employment creation, skills acquisition and income generation as a strategy for poverty alleviation, was created for citizens who do not qualify for SHHA loans. Participants must be unemployed and over 18 years of age. If employed, they must be earning below the SHHA minimum income criterion.

Initial capital to set up projects to produce and market building materials is provided by government. Subsequently, households venture into business to generate income, which enables them to build their own houses. This approach was adopted in recognition of the fact that poor households need to be empowered economically since they lack basic inputs such as the necessary skills, tools and finance for the development of even the most basic businesses. It is also in line with the participatory and self-reliant approach to development, which enhances the sustainability of projects.

Piloted in Francistown, Mahalapye and Ghanzi in 2000, the scheme has since been extended to eight other localities throughout the country. Houses range from one room to three rooms with a kitchen and wet core. Plans are approved by respective councils for compliance with existing building regulations and standards. It is also possible to extend these houses as and when resources permit. The projects have managed to offer employment to more than 200 beneficiaries whose average monthly wages range between P40 and P3 000.

LAND DEVELOPMENT

Delays in land acquisition, the high cost of servicing land in the market, and the acute shortage of serviced land for commercial and industrial needs, act as constraints to investment. In particular, the shortage of serviced land in both rural and urban centres and problems related to plot development are cited as investment constraints.

Measures currently being taken by government to address these constraints include the involvement of the private sector in land servicing and the development of land management systems; including improved land records management. Furthermore, a review of all land related laws and policies has taken place and a comprehensive Land Policy formulated in order to promote equitable land distribution and address land use conflicts, land pricing and land rights, as well as strengthen land management. The new Land Policy should go a long way towards establishing a favourable environment for both domestic and foreign direct investment, thus contributing to economic diversification and global competitiveness.

Government continues to review and, where necessary, revise, policies and guidelines governing land use and development. Land servicing and extension of property development and housing programmes to rural areas of the country are also in the spotlight. Other strategies include acquisition of freehold farms and the creation of a land bank. In addition, land policing will be effected to discourage illegal occupation and development of land.

Institutional framework

The Department of Lands came into being in 1994 and is responsible for administering state land as well as providing direction on land administration matters. The department's five sections, namely Inventory and Management, Estates and Valuation, General Administration, Information Technology as well as Legal Services, carry out its functions.

The Department of Surveys and Mapping is a specialised National Mapping Agency responsible for providing professional services and advice to government on matters relating to land and geographic information, land surveying and mapping. The aerial photographs and remote sensing satellite imagery acquired through contract services are a basic input of topographic mapping and are also disseminated to stakeholders and, in turn, used by them in socioeconomic development planning.

Ministry Management is a department headquarters within the Ministry of Lands and Housing. Its functions are to coordinate and provide administrative support services within the ministry at all levels, and develop, introduce and maintain sound operational policies and guidelines.

The central government body responsible for physical planning, the Department of Town and Regional Planning (DTRP) is involved in formulating national physical planning policies and strategies as well as administering the Town and Country Planning Board. Land Use and Development now falls under the Department of Town and Regional Planning.

Formerly the responsibility of the Ministry of Local Government, the land servicing component leading to land allocation has been transferred to the Ministry of Lands and Housing. In order to improve on service delivery, it is considered essential that all components of land delivery (planning, surveying, land servicing and allocation) be part of one ministry. The Land Servicing Unit has been upgraded to a fully fledged department – the Department of Technical Services.

Comprising three members, the Land Tribunal has the main function of adjudicating on appeals against land boards. Land tribunals operate from Gaborone and Palapye.

(continued on page 162)

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TRANSPORT INFRASTRUCTURE

A well-functioning economy relies on the safety and security of its transportation system. This encompasses cities and towns, the corridors and networks that span the country, and the border posts and airports that link Botswana to the rest of the world. Transport gateways support not only the trade in goods, but also the burgeoning tourism industry. These factors are particularly important for Botswana, which is landlocked as well as having an unevenly distributed population.

The country's transport network has improved substantially since independence in 1966, when there was very little basic infrastructure apart from the

Botswana's transport system plays an important role in the country's economic development and competitiveness as well as domestic and regional integration.

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railway line from South Africa through Botswana to Zimbabwe (then Rhodesia). From less than ten kilometres of tarmac, a system of tarred roads now links all of Botswana's major population centres and many other settlements, while international airports and airfields – which are currently undergoing a major development and expansion programme – provide easy access to tourist attractions as well as connecting the country to the wider southern African region.

Botswana actively pursues strategies for regional cooperation on infrastructure development and integration as a means of creating more active trade routes and expanding market access, and is engaged in a number of projects under both the New Partnership for Africa's Development (NEPAD) and the Southern African Development Community (SADC).

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Presently, about 4 million tonnes of cargo is carried annually by Botswana's transport infrastructure network, and it is planned that this volume will increase by 25 percent to 5 million tonnes during NDP 10.

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The 2010/11 development budget set aside the second largest allocation for the Ministry of Transport and Communications at P2.1 billion, with the two biggest projects comprising Air Transport Infrastructure (P693 million) and Bitumen and Trunk Roads (P707 million). The ministry with the third largest budget is Local Government at P1.65 billion, with P338 million for District and Urban Roads.

TRANSPORT HUB

The Transport Hub is responsible for identifying and coordinating the implementation of strategic projects and investment opportunities within the transport sector, as well as developing policies and plans to expand and enhance the utilisation of existing infrastructure. Initiatives being monitored by the hub include the following:

- The Kazungula Bridge Project, which aims to connect Botswana, Zimbabwe and Zambia and replacing the existing ferry over the Zambezi River, will ease transport constraints and improve trade links between these countries. The bridge is also vital to SADC's North-South corridor, linking Botswana, the Democratic Republic of Congo (DRC), Malawi, Mozambique, South Africa, Zambia and Zimbabwe, while interlinking with corridors such as the Trans-Kalahari.
- The Trans-Kalahari rail link involves developing a railway line between Gobabis in eastern Namibia across the Kalahari to the Botswana Railways network and joining the Transnet Freight Rail in South Africa. In addition, the leasing of a dry port at Walvis Bay is expected to cut costs as well as the time taken in the import and export of goods.
- Air transport sector liberalisation, with proposals to liberalise air transport services approved.
- Efforts to attract long-haul carriers to operate in Botswana.

POLICY DEVELOPMENTS

Work is ongoing on the Integrated Transport Policy, which covers road, rail and air transport systems with the aim of securing a sustainable transport system, optimising investment in the sector and supporting all areas of the economy with adequate transport, enabling the various modes of transport to complement each other and interface appropriately, and promoting healthy competition for the benefit of transport users as well as the economy.



Research has shown that road vehicles only pay between one third and two thirds of the costs that they impose on society, which is why it is difficult for more sustainable modes of transport to compete in this highly price sensitive market. The Integrated Transport Policy's aim should be to address the above and other issues which cause disequilibrium between road and rail.

The policy will be used to guide government as it shifts its role toward strategic management, while the private sector moves toward increased participation in the sector, and will pave the way for the formulation of a Transport Master Plan. The policy is expected to look beyond the traditional transport framework of moving goods and people and address broader issues such as economic growth, land use, the environment, poverty, accessibility and equity and, above all, quality of life.

ROAD INFRASTRUCTURE

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and goods. The country's central location in southern Africa underlines the importance of access to the region's road infrastructure in linking it to harbours in Namibia, South Africa and Mozambique, along routes such as the Trans-Kalahari and Maputo corridors.

The Ministry of Transport and Communications, through the Department of Roads, is responsible for the maintenance of the primary and secondary road network, while tertiary and access roads are the responsibility of city, town and district councils under the Ministry of Local Government.

Public highway network

At present, the Public Highway Network (PHN) covers some 18 327 kilometres, classified into four categories; namely, primary, secondary, tertiary and access roads. Central government is responsible for about 9 000 kilometres of primary and secondary roads, out of which 6 500 kilometres are paved and the remaining 2 500 kilometres unpaved. The total network of roads under local authorities comprises 14 611 kilometres, which includes 9 327 kilometre of PHN as well as internal roads, with 1 165 kilometres of track, 6 013 kilometres of earth, 5 500 kilometres of gravel and 1 934 kilometres of tar.

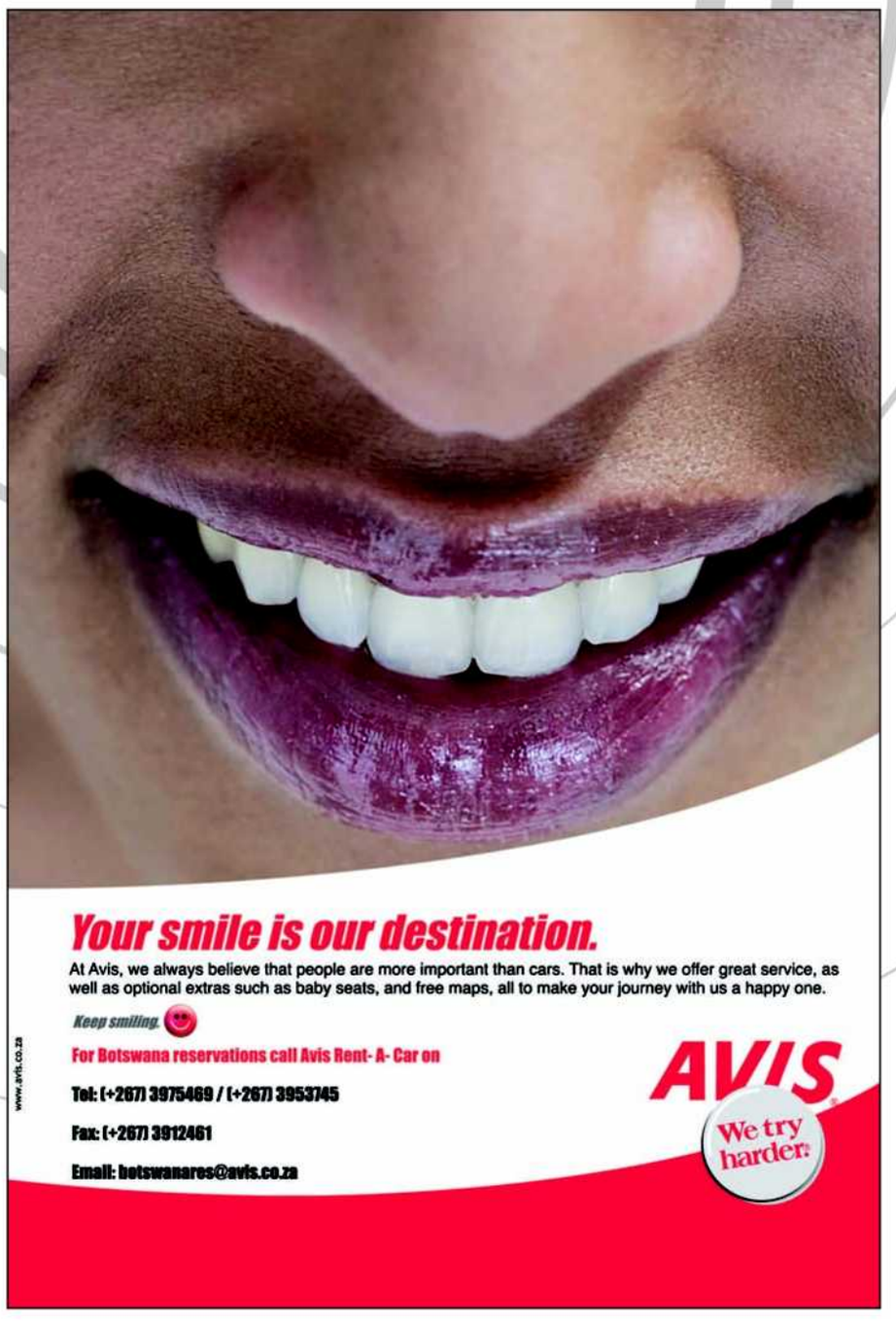
A network of bituminised roads extends along the more populated eastern side of the country, linking Botswana with South Africa to the south, Zambia and Zimbabwe to the north, and Namibia to the west. The remote western areas are characterised by vast distances between settlements and low population densities. These areas are considerably more accessible since the completion of the Trans-Kalahari highway, which has made the country more closely integrated and brought tourist attractions and game reserves such as the central Kgalagadi Game Reserve in closer reach. The highway has shortened travelling times in the region, cutting the route between Gauteng and Windhoek by approximately 400 kilometres.

The Ghanzi-Sehitwa road completed a bitumen-surfaced ring road round the country. By linking remote settlements to primary roads, the road has integrated rural communities with the rest of the country, thus improving socioeconomic development. The ring road also offers a comfortable means of exploring Botswana's many tourist areas on a round trip of the country, and provides alternative and cheaper access routes to Angola and other countries to the north.

Road construction

Construction of roads is undertaken according to the Botswana government's plan of building and maintaining a bituminised network spanning the entire country and linking district centres. With the primary road network now complete, the emphasis of development programmes is on bitumen road improvements through upgrading of trunk roads in urban areas, rural roads and bridge construction projects.

Private sector consultants and contractors currently implement all central government road development projects, including new road and bridge construction works. In addition, they carry out over half of the routine maintenance projects. Increased outsourcing over the past few years has created additional jobs in the private sector and reduced expenditure on operations by the Department of Roads. Schemes are also implemented to alleviate poverty and empower citizen contractors by identifying projects which can be executed via labour based methods as well as by setting aside the upgrading of access roads to bitumen standard for execution by citizen contractors.



Over 60 percent of the planned NDP 9 road and bridge projects were at various stages of implementation by the end of the plan period. Completed roads and bridges include Mopipi–Rakops, Letlhakeng–Dutlwe, Nelson Mandela and Lemmenyane Drive, Mahalapye–Kalamare, Sekoma–Kokotsha and Dibete–Mahalapye, Thamaga Bridge, Tlokweng Old Bridge, Moshupa Bridge and Letlhakane Bridge. Ongoing projects include Dutlwe-Morwamosu, Middlepits–Bokspits, Tsabong–Middlepits, Gaborone–Tlokweng, Francistown–Ramokgwebana and Gaborone–Metsimotlhabe.

Factors contributing to delays in implementation include budgetary constraints, non-availability of appropriate manpower, inadequate resources within the industry (contractors and consultants) to effectively implement projects due to demand by major regional projects such as the 2010 World Cup, long procurement processes and capacity constraints within the Roads Department.

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The tarring of the Tsabong-Bokspits Road, which connects many villages to the district headquarters in Tsabong, is a major development for the Kgalagadi area, much of which is not easily accessible by road.

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During NDP 9, the Roads Department expanded the labour-based routine maintenance programme that had been piloted in NDP 8. The roads covered included Ramatlabama–Ramokgwebana, Lobatse–Jwaneng, Gaborone–Kanye, Gaborone–Tlokweng Border Post, Gaborone–Molepolole, Francistown–Mathangwane, Serule–Sefhope, Kgagodi–Sefhope, and Palapye–Seleka.

Cost recovery and sustainability

While the main road network is now substantially in place, upgrading and maintaining existing roads is vital, with the most serious challenge faced by the Department of Roads to ensure the serviceability of primary and secondary roads on a very limited budget. Road condition surveys conducted in 2005 indicate that about 30 percent of the low and medium volume paved road network and 22 percent of the high volume paved network are in poor or very poor condition.

Documentation of best practices in the form of guidelines, such as the Road Maintenance Manual, is continuing. A review of the Public Roads Act is underway, which is expected to lead to an amendment of the act during NDP 10.

With road traffic increasing at an ever more rapid rate, recovering costs through the implementation of road user charges and outsourcing or privatisation remain central to government policy. Furthermore, it has been decided that new roads will be built to connect productive areas in the different sectors only where it is economically viable.

The Access Road Policy was revised during NDP 9 and cost recovery charges introduced for some activities. Existing sources of funds for road maintenance are, among others, fuel levy, vehicle licences, transport permits and driving licences, with foreign private vehicles entering Botswana charged a road users' fee at border posts. A Road Tolling Feasibility Study was also carried out during NDP 9. However, it was subsequently decided that tolling was not feasible at current traffic levels.

Despite these developments, total revenue from user charges still covers only about a third of the maintenance required. For economic efficiency, there is a strong case for charging users the full cost of maintenance through a system of user charges comprising fuel taxes and vehicle license and permit fees. Increases in such charges should be phased in



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gradually with a view to achieving full cost recovery by the end of NDP 10.

Road Transport and Safety

The Department of Road Transport and Safety (DRTS) ensures that the national road network and transport system is safe, cost-effective, environmentally sensitive and customer-oriented through the provision of appropriate legislation and education in accordance with national policies on road transport. However, the growing number of vehicles in Botswana is putting additional pressure on existing infrastructure and other DRTS resources. The increase in motorisation has also led to more road accidents.

Amendments to the Road Traffic Act, to strengthen the legal provisions to penalise poor driving and driving under the influence of alcohol, have been under consideration by government. The amendments would introduce a system of cumulative penalty points on a person's driving licence, and strengthen enforcement in respect of driving under the influence of alcohol and non-payment of fines. Provision would be made for use of traffic cameras. DRTS is also reviewing the Road Transport Permits Act with a view to updating the act during NDP 10.

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The first Botswana Road Safety Strategy was due to be finalised during 2010. This will, in turn, inform the review of both the Road Traffic Act and the Road Transport Permit Act. In order to improve road safety, the Ministry of Transport and Communications has undertaken to widen some roads and in certain instances increase the number of lanes so as to help channel traffic more efficiently.

A Strategic Plan has been developed for the Motor Vehicle Accident (MVA) Fund that covers the period 2008 through to 2012. The Strategy focuses on service excellence, healthy stakeholder relations and high performance, and will introduce a Safety Community Grant Scheme during the 2010/11 financial year.

Other projects undertaken in recent years include the computerisation of transport permits and road worthiness certificates, the automation of driver theory tests and the computerisation of Dibete weighbridge. These were intended to curb the fraud and corruption associated with the issuance of these documents.

The introduction of computerised credit card-type driving licences has helped to enhance road safety and harmonise traffic standards in the SADC region. In order to address emerging needs as well as to maintain efficient and effective service delivery, upgrades were initiated and completed on the driving licence system (DLS) and public officers' identity document (POID) systems, as well as the vehicle registration and licensing systems (VRL).

While a study on the planned introduction of metered taxis was undertaken during NDP 8, this has not yet been implemented. DRTS plans to update the study with a view to introducing metered taxis during NDP 10.

Central Transport Organisation

The Central Transport Organisation (CTO) aims to provide cost effective and efficient government transport services. However, the cost of maintaining the government fleet (which now comprises almost 10 000 vehicles) has been on the increase. To promote more responsible vehicle usage, CTO was expected to decentralise financial responsibilities for vehicle usage to users, and discussions are underway in this regard.

A recent diagnostic study was undertaken with

the aim of reviewing the operations of CTO, identifying strategies for improving efficiency and service delivery, and analysing all options for the provision of efficient transport services.

The various options include, among others, Public-Private Partnership (PPP), privatisation, outsourcing and full maintenance leaseback.

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The CTO was able to increase vehicle availability from 85 percent to 90 percent of its active fleet during NDP 9.

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AIR TRANSPORT

The efficiency and effectiveness of Botswana's air transport sector is being improved and expansion of the air transport network accelerated through market liberalisation, privatisation and commercialisation. Cost recovery is pursued through avenues such as air navigation and passenger service charges and landing fees, with Botswana's airspace continuing to be one of the busiest in Africa in terms of over flight traffic.

Air transport is indispensable for a land-locked country such as Botswana, with its vast area, scattered settlements, long distance from most of the world's industrial centres and remoteness of many of its tourist attractions. Through its support of both trade and tourism, the sector also plays a key role in facilitating diversification of the economy.

As a contracting state to the International Civil Aviation Organisation (ICAO), Botswana is mindful of the vital role played by civil aviation in advancing the socioeconomic needs of its citizens and meeting the requirements of globalisation, and hence the importance of providing a safe, secure and efficient air transport system. As such, various initiatives are undertaken in order to reduce air accidents and incidents as well as cases of unlawful interference with civil aviation. These include the Universal Safety Oversight Audit Programme (USOAP), Safety Management System (SMS), Human Factors in Aviation and aviation security.

Substantial liberalisation of regional air services between states in the SADC region, as envisaged in the SADC Protocol on Transport, Communications and Meteorology as well as the Yamoussoukro Decision on the Liberalisation of Air Transport in Africa, is witnessing the introduction of an intra-Africa 'open skies' initiative. Bilateral air services agreements (BASAs) have been signed with a number of other SADC countries, as well as Belgium, Germany, Pakistan, Qatar, United Arab Emirates, Netherlands and United Kingdom, to the benefit of various economic sectors, including tourism, trade, commerce and investment.

Due to its location in the heart of the SADC sub-region, political and economic stability and inexpensive aircraft parking space, Botswana offers ample opportunities in terms of civil aviation development. Areas include aviation training, cargo and logistics, aircraft maintenance, aircraft ground handling and aviation management consultancy. These prospects are even more attractive in view of the ambitious airport expansion programme currently underway to enhance the carrying capacity of airports to accommodate larger aircraft and upgrade air navigational aids.

Civil Aviation Authority of Botswana

The Civil Aviation Authority of Botswana (CAAB) is mandated to promote the safe, secure, regular and efficient use and development of civil aviation in Botswana. It aims to be responsive to the dynamics of the aviation industry, social and economic development, and the need to promote trade and tourism.

The Civil Aviation Authority Act has repealed the Civil Aviation Act which set up the former Department of Civil Aviation (DCA). Therefore, as of 1 April 2009, CAAB became responsible for the regulation of air transport, the provision of air navigation and air traffic services, and the operation and development of airports in Botswana. Despite the change from DCA to CAAB, the operations of civil aviation remained essentially unchanged during the transition.

Notwithstanding the difficult economic conditions experienced worldwide in recent years, indicators show that the aviation industry will rebound because of its inherent advantages of greater safety and swiftness over competing modes of transport. In view of this, CAAB continues to improve aviation facilities and services in order to attract more business and to encourage competition as per government's decision to liberalise the aviation industry.

During 2010, it was announced by the Ministry of Transport and Communications that CAAB is to invite local operators to apply for scheduled airline operations for international routes, and will also start issuing licences for domestic routes. However, Air Botswana will maintain its monopoly over the Maun/Johannesburg route for some time in order to allow the national airline to establish itself as a regionally competitive airline.

Airport infrastructure

Botswana has six international airports, 19 well-maintained airfields in major villages

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throughout the country, and 52 private airfields catering mainly for tourists. The principal airport, Sir Seretse Khama International Airport (SSKIA), is situated 11 kilometres north of the capital Gaborone.

Maun, the gateway to the famous Okavango Delta, has the busiest airport in terms of aircraft movements. Opened in 1993 and located near the famous Chobe Game Park, Kasane Airport is only a short drive away from Victoria Falls. Other airports are located at Francistown, Selebi-Phikwe and Ghanzi. The construction of Limpopo Valley airfield in the Northern Tuli Game Reserve has opened up the area to tourist traffic.

Over the past few years a major improvement programme has been underway at Botswana's principal airports at a cost of over a billion pula. Upgrades at Maun, Kasane and Francistown are enabling the airports to accommodate fully-loaded B737s or a similar class of aircraft, while those at SSKIA cater for B747s.

In addition to the new cargo terminal building, works at SSKIA include: a new 23 000 square metre passenger terminal building in front of the existing terminal building, designed for a typical peak-hour passenger capacity of 976; extension of the runway length from 3 000 to 4 000 metres to cater for a fully loaded Boeing 747 aircraft; and construction of a full-length parallel taxiway and runway edge lighting to facilitate the landing and taking off of aircraft.

Improvements being undertaken at Francistown Airport include a new terminal building, air traffic control tower and associated buildings. This includes realignment of the 3 000 metre runway – with an allowance to extend it by another 500 metres – a link taxiway, new apron, drainage, security fence, new approach road, aerodrome lighting systems, and improved navigational facilities. Reorientation of the runway will enable aircraft to avoid flying over the city centre, thereby helping to improve flight safety and eliminating the need for restrictions on the development of high-rise buildings in the CBD.

The Maun Airport project comprises construction of a 3 700-metre runway, conversion of the existing runway into a full length parallel taxiway, including associated movement areas as well as a new 10 000 square metre terminal building and related buildings to cater for a typical peak hour passenger capacity of 637. The meteorological balloon filling station is being relocated, a new control tower constructed and the old terminal building converted to a VIP block and management office.

The runway at Kasane Airport is being widened, strengthened and lengthened to 3 000 metres, with runway lights. In addition, the apron is being extended and the air traffic control tower and terminal building improved, including a VIP lounge. The relocation of Ghanzi Airport comprises construction of a 2 000-metre runway, link taxiway, apron and terminal building, with an attached air traffic control tower and crash fire and rescue building.

In addition, Tsabong, Hukuntsi and Serowe airfields are to be relocated, and Selebi-Phikwe Airport is to be improved. Several airstrips which form the backbone of the tourism industry will also undergo refurbishment.

The upgrading of Maun and Kasane airports, which is scheduled for completion in 2011, will enhance Botswana's competitive edge in attracting tourists, as the country faces competition from its neighbours who are able to fly visitors to attractions such as Livingstone and the Victoria Falls.

SADC air cargo hub

The Ministry of Transport and Communications, together with the Ministry of Trade and Industry and the Ministry of Foreign Affairs and International Cooperation, is exploring the idea of promoting Botswana as an air cargo hub within the SADC region through a detailed feasibility study.

The proposed air cargo hub would cater for air cargo traffic emanating from the SADC region as well as the agro-commercial project at Pandamatenga, comprising mainly perishables requiring managed cool-chain handling to international standards. This is an opportunity for establishing a specialised perishables hub for the region by creating facilities to handle goods in an economical and efficient manner, thereby enhancing ongoing efforts to diversify the economy.

Air Botswana

Air Botswana was created as a parastatal under the then Ministry of Works, Transport and Communications in 1988. Within five years, the airline's ambitious expansion and development strategy saw it acquiring a modern fleet and building excellent engineering, operations and administration facilities, including the installation of a global computer reservations system.

However, the expansion that had been predicated on planned cooperation and projected traffic growth did not materialise. By 1994 the airline was making losses, and the government directed that it should be restructured, recapitalised and privatised as soon as it became profitable. A programme of cost cutting and right-sizing was implemented, with a redirection in focus from regional to domestic and feeder operations. As a result, profits were realised for the first time in 1996/97, a trend which continued up until the 2003/04 financial year.

While the deregulated aviation environment provides Air Botswana with a much larger market, and therefore a greater potential revenue base, it also brings about challenges in the form of competition. With both the cargo and passenger markets between Botswana and South Africa now open, Air Botswana is in a position to penetrate the larger South African market, provided it acquires better aircraft. There are also opportunities for growth in the wider regional market as trade increases among SADC member states and the tourism industry expands.

Air Botswana has been recapitalised in order to bring about a sustainable improvement in its performance. In 2007/08, it recorded a net profit in the region of P12 million and an operating profit of around P17 million. On-time departure for the year was approximately 80 percent, after being well below 60 percent three years previously. However, during the 2008/09 financial year, the airline registered a net loss of P87 million. Meanwhile, a decision has been taken to defer the privatisation of the airline after previous attempts were found to be unsuitable.

At present, Air Botswana's domestic route network links Gaborone with Francistown, Botswana's second city, and with Maun, on the edge of the great Okavango Delta, and Kasane, which is the gateway to Chobe River and National Park on the northern border with Namibia. Regional destinations are Johannesburg and Harare. Air Botswana also operates between Gaborone and Nairobi in popular code-share joint services with Kenya Airways.





Left and above:
THE NEW TERMINAL BUILDING PHASE 1, NOW OPERATIONAL AT SIR SERETSE KHAMA INTERNATIONAL AIRPORT, GABORONE

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Tel: +267 3913236
Fax: +267 3913121
Plot 61920, Fairgrounds Office Park
Gaborone

CIVIL AVIATION AUTHORITY OF BOTSWANA

VISION

To be a world class provider of safe, secure and efficient aviation services

MISSION

To provide efficient and effective aviation services to our customers through continuous development of the aviation industry in Botswana.

BACKGROUND

The Civil Aviation Authority of Botswana (CAAB) was established under the Civil Aviation Authority Act of 2004, and assumed full responsibilities on 1 April 2009, following the transition from the Department of Civil Aviation (DCA).

The Authority is mandated to provide safe, regular, secure and efficient use and development of civil aviation in Botswana. It is responsible for the regulation of air transport, provision of air navigation and air traffic services as well as the operation and development of airports in Botswana.

The Authority works to achieve its vision of being among the world leaders and providers of safe, secure and efficient aviation services by adhering to international Standards and Recommended Practices (SARPs).

SERVICES

The Authority endeavours to provide world-class service. Some of the services include:

- Issuance, Renewal or Variation of Airworthiness Licenses
- Inspection of Aircraft
- Issuance, Renewal or Variation of Personnel Licenses
- Aircraft Landing
- Aircraft Parking
- Air Navigation and Communications
- Fuel Handling
- Passenger Services
- Air Operators Certificates
- Approval of Aircraft Maintenance Organization
- Noise and Environmental Pollution
- Air Transport Licences
- Traffic Handling
- Aircraft Handling
- Any other services related to the operation of aerodromes
- Use or Rental of Any Assets of the Authority

CURRENT DEVELOPMENTS

NEW TERMINAL BUILDING PHASE 1 AT SIR SERETSE KHAMA INTERNATIONAL AIRPORT IS NOW OPERATIONAL

The Civil Aviation Authority (CAAB) is proud to announce that Phase I of the New Terminal Building at Sir Seretse Khama International Airport is now operational and open to passenger traffic since May 2010. The building has been under construction since 2008.

Upon completion of Phase II of the terminal building, which is still under construction, SSKIA will handle 976 Typical Peak Hour Passengers. The extended Runway of 4km is now capable of accommodating B747 or equivalent class aircrafts, with full length parallel taxiway. This state of the art facility will boost of extended floor space, exciting shopping experiences that offer travellers the opportunity to buy last minute essentials and souvenirs.



CHECK-IN DESK AT SSKIA

In addition to the various Government departments that operate at the airport, including BURS and Immigration, other business stakeholders such as airlines, car hire companies, and foreign exchange bureau and a restaurant are now operational in the new terminal under phase 1 of the SSKIA expansion project. Under this project navigational aids were modernised to enable CAAB to provide the highest standard of air navigation services in Botswana air space.



FRANCISTOWN AIRPORT - AIRSIDE



FRANCISTOWN AIRPORT - LANDSIDE

FRANCISTOWN AIRPORT

Francistown Airport is also amongst ongoing airport expansion projects. The project which has been running concurrently with the SSKIA project is 84% complete. Improvements works being undertaken at Francistown Airport include: new terminal building, air traffic control tower and associated buildings, Realignment of the existing 2200 meters runway with an allowance to extend it by another 800meters – a link taxiway, a new apron, drainage, security fence, new approach road, aerodrome lighting system and improved navigational facilities. Reorientation of the runway will enable aircraft to avoid flying over the city centre, thereby helping to improve flight safety and eliminating the need for restrictions on the development of high rise buildings in the CBD.

© B&T

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Air Botswana operates and maintains a modern fleet of turbo propeller aircraft from the noted French-Italian manufacturer ATR: two new 68-seat ATR 72-500 aircraft and three smaller 47-seat ATR42-500s.

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RAIL TRANSPORT

Botswana's original railway line was laid in the late nineteenth century as part of Cecil Rhodes's dream of a Cape-to-Cairo railway track. Today the route length of railways comprises almost 900 kilometres of single line laid to Cape gauge (1 067mm), and includes 641 kilometres of main line between Ramatlabama in the south and Vakaranga in the north, as well as 250 kilometres of branch lines serving copper-nickel mines in the Selebi-Phikwe area, coal mines in Morupule and the soda plant at Sua Pan.

Established in 1987, Botswana Railways (BR) forms a crucial link in the railway systems of the southern African region. Along with South Africa's Spoornet to the south and National Railways of Zimbabwe (NRZ) to the north, it provides a connection to Namibia and Swaziland and an unbroken rail link to Zambia, the DRC, Angola, Mozambique, Tanzania and Malawi.

Operational environment

Botswana Railways has traditionally earned most of its revenue from transit traffic. However, the railways has been operating under difficult conditions for some years as a result of stiff competition for transit traffic, not only from the road transport sector but also from other regional railways – particularly after the completion in 1999 of the railway line linking Beitbridge and Bulawayo in Zimbabwe, which has resulted in the gross underutilisation of BR's route as well as a reduction in profitability.

It is hoped that new traffic from mining will create opportunities to expand the railway network by developing links connecting Botswana to Namibia and Zambia, and additional links with South Africa. This could, in turn, promote Botswana as a regional railway hub. In this regard, Botswana Railways has submitted Terms of Reference to the World Bank for funding of feasibility studies in establishing the following railway lines:

- Mahalapye/Mmamabula-Ellisras/ Lephalale (proposed coal export corridor)
- Trans-Kalahari Railway line, connecting Botswana to Namibia (to create an alternative south-west logistics corridor, mainly for coal export, but with the possibility for other commodities)
- Rail extension from Mosetse to Kazungula (to create an alternate north-south corridor to Zambia, the Democratic Republic of the Congo, etc.)

Botswana Railways lacks capacity to overhaul its rolling stock in-house, and outsourcing has proved to be very expensive, especially the overhaul of locomotives and wagons. BR is looking into using PPPs to build a wagon and locomotive overhaul and assembly plant, and to expand the existing workshops. Because of the deteriorating condition of its passenger coaches, BR terminated the operations of the passenger service until a profitable and more sustainable mode of operation is found.

The commissioning of the new Signalling and Telecommunications (S&T) system by BR took place during 2008. This system will help reduce deaths and injuries due to train accidents, and should also improve the running of trains in general. To take further advantage of the system, BR has signed a Memorandum of Understanding with ANSALDO for a feasibility study into a possible communications venture. Local telecommunications companies, such as Mascom, BTC and Orange, have shown interest in renting any excess bandwidth.

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BR PROPERTIES

As a result of the amendment to the Botswana Railways Act in July 2004, Botswana Railways (BR) formed a subsidiary company under the name BR Properties (Pty) Ltd in 2007. This decision was taken to augment revenue generation, since BR owns prime land in major towns, cities and villages.

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Plans for NDP 10

During NDP 10, BR's main priority will be to implement the Turnaround Strategy and to attain the agreed key milestones in order to be eligible for successive tranches of government investment financing. This covers:

- Internal business remodelling
- Changing the business model from a transit railway to a mineral export railway
- Rehabilitation of existing locomotives, rolling stock and track infrastructure
- Investment in additional wagons to overcome capacity shortfalls
- Human capital development
- Overhaul of BR's information technology
- Improving safety, health and the environment

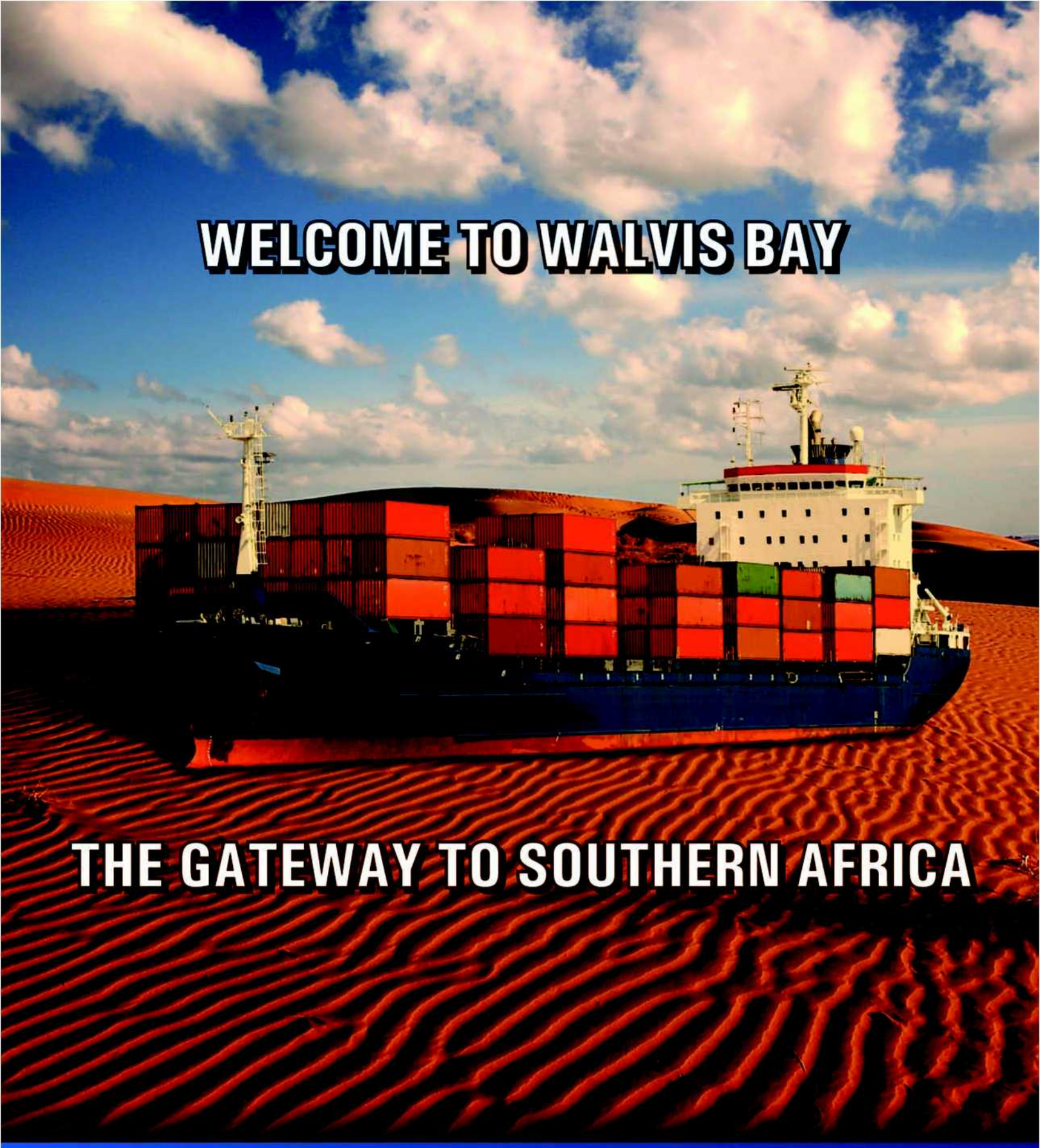
It is expected that during NDP 10 feasibility studies will be prepared for the proposed Trans-Kalahari Railway project, and possibly for other links to connect the BR main line with the South African network at Ellisras, and to extend the railway north to Kazungula. These studies will consider options for private sector participation in construction and operation of the proposed railway lines, with a view to relieving BR of the associated construction and operating risks, and reducing government's role to coordination and regulation.

A further issue for NDP 10 concerns whether to provide passenger services. In the past, passenger services made a substantial loss. As a result of the development of the road network, such services have been replaced at no cost to government by long distance bus services.

DRY PORT FACILITIES

To take advantage of growing containerised traffic, BR formed a joint venture company (Gabcon) with Transnet Freight Rail of RSA. Gabcon is a dry port container terminal located in Gaborone and registered as an independent entity. The Francistown Dry Port (Francon) has also been developed as a standalone entity. Established with the aim of increasing BR's share of freight traffic, these dry port facilities have reduced the costs and time of containerised cargo deliveries, giving locally based importers and exporters a safer, faster, cheaper alternative to road transport.

The establishment a dry port facility in Namibia's Walvis Bay is also being looked at. A viable alternative to the ports of Durban and Cape Town for the country's exports and imports, Walvis Bay offers a shorter route to Europe and the Americas as well as highly competitive rates and better performance indicators than the Durban port. The development of the dry port would reduce transport costs, rendering the country's exports more competitive in the global market. The proposed dry port would also promote the utilisation of the Trans-Kalahari corridor.



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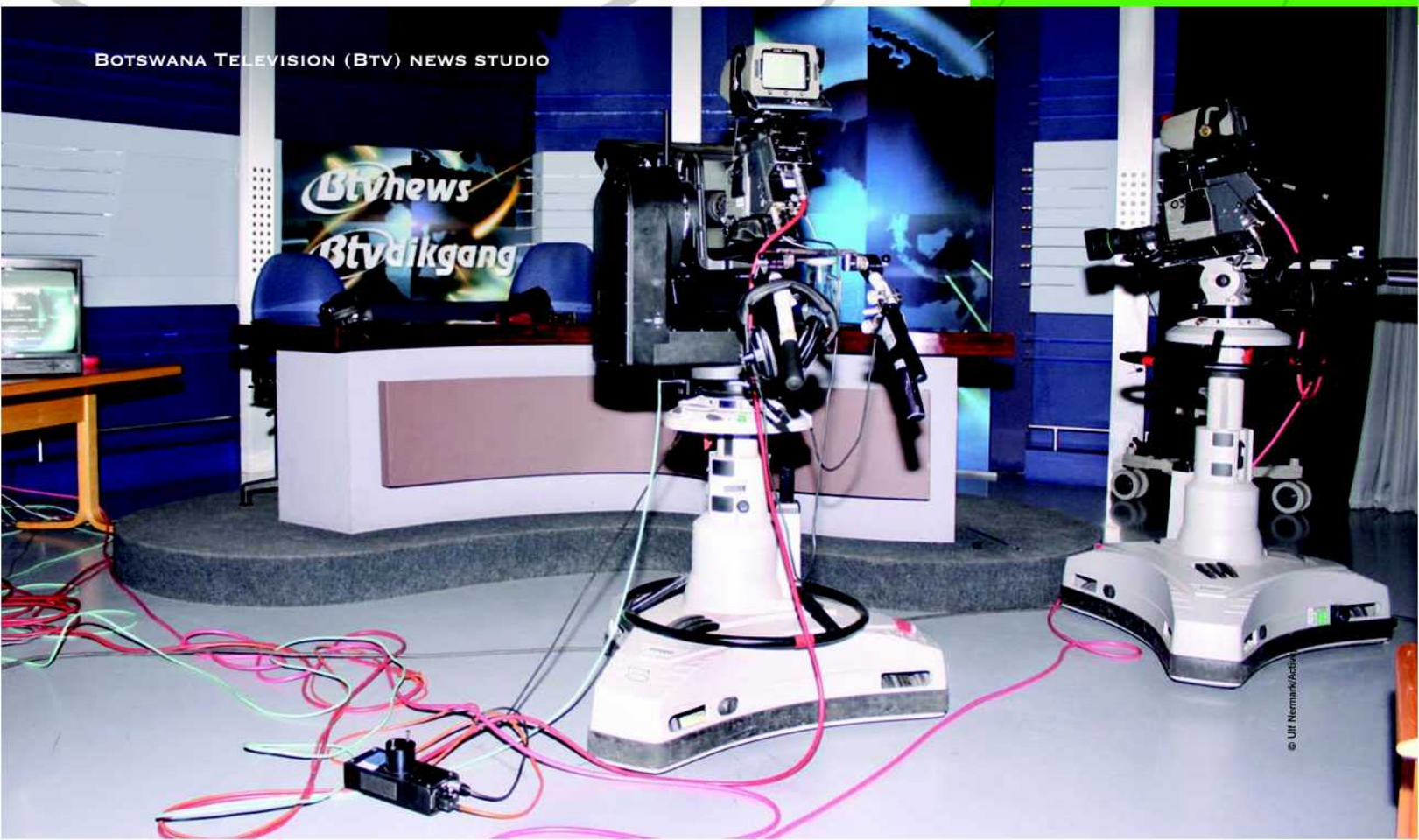
NAMPORT

INFORMATION AND TELECOMMUNICATIONS TECHNOLOGY

Botswana's Information and Communications Technology (ICT) sector has experienced rapid liberalisation, diversification and private sector participation in recent years so as to improve cost and efficiency and thereby stimulate growth in a variety of economic sectors.

Botswana's National ICT Policy states that 'Botswana will be a globally competitive, knowledge and information society where lasting improvements in social, economic and cultural development are achieved through the effective use of ICT'.

In support of this objective, additional investment is being directed towards the upgrading of the country's communications networks and equipment, while the telecommunications liberalisation programme continues to enhance competition and assist operators in taking full advantage of emerging technologies. This should help to attract additional FDI in areas such as information-based services, web hosting, data centres,



BOTSWANA TELEVISION (BTV) NEWS STUDIO

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REPUBLIC OF BOTSWANA

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GPPS has since expanded its services/products to include printing of the Daily Newspaper. Current distribution is at 80 000 copies nationwide. Coupled with the acquisition of this state of the art Web Machine, the department has also procured a Computer to Plate Machine.






ABOUT GPPS

The Department of Government Printing and Publishing Services falls under Ministry of State President. The department is mandated to provide printing services to all Government ministries and departments as well as serve as Government publisher and distributor of Government publications.

VISION

The Department of Government Printing and Publishing Services will achieve excellence by providing quality printing, publishing and related services.

MISSION

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call centres, global financial services and software research and development, and provide the foundation for promoting Botswana as a regional ICT hub.

ICT initiatives and projects taking place during National Development Plan 10 (NDP 10) are guided by Botswana's ICT Policy. In addition, the Botswana Innovation Hub is being set up as a further strategy to facilitate the country's transformation into a knowledge economy. When fully operational during NDP 10, the Hub will provide a platform for technology-driven and knowledge-intensive industry, researchers, higher education institutions and the public sector to work together in fostering innovation and entrepreneurship.

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SECOND ONLY TO SOUTH AFRICA

The International Telecommunications Union (ITU) ranks Botswana's telecommunications infrastructure 109th in the world and eighth in Africa – where it is second only to South Africa among other southern African countries.

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NATIONAL ICT POLICY

Botswana's National ICT Policy *'Maitlamo'* (meaning 'commitment') was approved in 2007. It comprises three overall objectives: the creation of an enabling environment for the growth of an ICT industry; the provision of universal service and access to information and communication facilities; and the transformation of Botswana into a regional ICT hub, thus making the country's ICT sector globally competitive. The key aspects of the policy cover community access and development, government, learning, healthcare, ICT and economic diversification, infrastructure, and connectivity laws and policy.

The main initiatives outlined in the ICT Policy that are presently being implemented include:

- *E-government* – The e-government programme aims to integrate all current and future ICT systems to achieve a collaborative approach to service delivery. The project is being delivered through a government web portal and is divided into two phases: e-information, which will provide one entry gateway for communication with government stakeholders, and e-services, which will provide an electronic platform for enhanced and automated service delivery. The whole project scheduled for completion by the end of NDP 10.
- *Thuto Net* – The objective of Thuto Net is to expose children to effective, affordable and accessible education, mainly through the use of ICT, with a target of 235 schools having been connected to the Internet.
- *Connecting communities* – The Connecting Communities Programme is meant to provide all rural and urban communities with affordable access to computers and the Internet. A total of 36 Kitsong Centres have been set up with 25 more centres being implemented in various post offices during 2010.
- *E-legislation* – This initiative addresses the legislative gaps that were identified during the development of the National ICT Policy e-readiness assessment exercise conducted in 2004.

The current development of the e-Governance programme will provide a platform for effective and efficient provision of services locally and internationally. Furthermore, the establishment of a Universal Service Fund to ensure sustainable implementation of the Universal Service Obligation will make telecommunications services accessible to all Batswana. To be submitted to parliament during 2010/11, the Universal Service and Access Policy will promote extended access to communication services by embracing opportunities created by emerging technologies.

Government is presently undertaking a study to develop ICT and Internal Reticulation Regulations for buildings, which will ensure that there are standards for ICT cabling and provision of wireless communications in all buildings. Standardising this area of service provision should help to open new business opportunities for Batswana.

Botswana started the process of charting a strategy to transform terrestrial broadcasting from analogue to digital in November 2008, with the transformation expected to be completed by December 2013. This is in line with the International Telecommunications Union (ITU) resolution aimed at enhancing the efficient use of the radio frequency spectrum, and will enable Batswana to access more and higher quality broadcasting services.

THE REGULATORY ENVIRONMENT

Botswana is a member of bodies such as the Southern African Transport and Communications Commission (SATCC), Southern Africa Telecommunications Association (SATA), International Telecommunications Union (ITU), Commonwealth Telecommunications Organisation (CTO), Universal Postal Union and African Postal Union.

The Botswana Telecommunications Authority (BTA) is the independent regulatory body for the telecommunications sector. Its functions include promoting the provision of telecommunication services throughout Botswana, licensing and type approval, consumer and user protection, frequency management, price control, promotion and maintenance of competition, and the settlement of disputes.

In addition to its statutory functions, the authority is also an advisor to government on general telecommunications policy, acting as the government's representative in regional and international bodies that deal with telecommunications in general and telecommunications regulation in particular. The BTA works closely with the Telecommunications Regulators Association of Southern Africa (TRASA).

BTA enjoys complete freedom in licensing operators and in establishing and financing its operational budget. A liberal regulatory framework for the industry is pursued, with the emphasis on facilitating the entry of new service providers and encouraging competition. The licensing regime caters for next generation networks, broadband wireless access and other technologies.

The National Broadcasting Board (NBB), through the Broadcasting Act of 1998, issues broadcasting licences, supervises the sector, and allocates available spectrum resources. A new regulatory body is being established that consolidates telecommunications, broadcasting, postal services, computer technologies and all other ICT subsectors, reflecting the technological convergence taking place in the global communications sector. Consequently, BTA is being merged with the National Broadcasting Board, and a Communications Regulatory Bill created.

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During 2009/10, government approved the merger of the Botswana Savings Bank (BSB) with Botswana Postal Services (BPS) under the Ministry of Transport and Communications, and that of the Botswana Telecommunications Authority (BTA) and the National Broadcasting Board.

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INDUSTRY COMPETITION

Adopted in 1995, the Telecommunications Policy for Botswana called for the introduction of competition in the sector as well as setting the goals of universal access, efficient services and regional balance between urban and rural areas. The Telecommunications Act of 1996 saw the end of the monopoly held by the Botswana Telecommunications Corporation (BTC) in providing telecommunications services and the subsequent issuing of cellular licenses to two mobile operators as well as licences for Internet and data service providers.

A further programme of liberalisation was announced in 2006, largely aimed at removing policy and regulatory barriers in the telecommunications market in order to facilitate and promote effective competition. This resulted in the introduction of a service-neutral licensing regime by the Botswana Telecommunications Authority (BTA) the following year. The new regime is far better suited to today's converged telecommunications environment, as it allows for integrated network platforms to carry diverse forms of communication, including fixed and mobile voice, data and moving pictures, originating from a variety of service providers.

The new licensing structure comprises the following main categories:

- ***Public Telecommunications Operator (PTO)*** licences – Former fixed (BTC) and mobile (Mascom Wireless and Orange Botswana) operators have been granted service-neutral licences. They are authorised to provide all forms of telecommunications services over fixed or mobile, wire line or wireless, network links, using any available technology, and to provide international telecommunications, including the operation of international gateways. Operators are required to maintain their existing network coverage and may also extend it, subject to obtaining the requisite approvals and allocation of radio spectrum where necessary.
- ***Value-Added Network Services (VANS)*** licences – Existing licences for the provision of Internet and data services are also being replaced by service-neutral and technology-neutral licences, covering all forms of value-added telecommunications service provision, including Voice Over Internet Protocol (VoIP) or Internet telephony at national and international level.
- ***Private Network licences*** – As such networks provide services to licensees for their own use only and are not connected to other public networks, they continue to be licensed separately, with appropriate minimum regulatory controls.

While ensuring that the telecommunication market continues to meet the communications needs of users and the economy, the service-neutral licensing regime also allows maximum freedom for commercial management to achieve this result in the most efficient way possible. Interconnections between networks, and between service providers and networks, remain a matter of commercial negotiation between the parties, subject to regulatory intervention by the BTA in the event of a dispute.

The market for Value-Added Network Services and Private Networks is fully liberalised, and any locally registered company is eligible to apply for a licence in these two categories. The number of licensees in these categories may only be limited by service demand and/or scarcity of resources such as spectrum and numbers.

The long-term benefits will be lower costs of communication services (voice, internet, data, postal and pay television). This is one of the measures that is critical for the attraction of foreign direct investment, better service delivery and affordability, particularly in the areas of financial services, ICT, science and technology, as well as the logistics of production and distribution.

TELE-COMMUNICATIONS

Botswana's telecommunications network has undergone a process of modernisation to handle advanced technologies, with the aim of achieving local and international capacity equal to or better than the infrastructure of regional neighbours as well as the global community. A nationwide fibre backbone network supports a wide range of services, and access to international bandwidth is being improved. Broadband services include ADSL and various wireless technologies, including a city-wide WiMAX network launched in Gaborone during 2008.

Following years of robust growth, the telecommunications sector expanded even further during 2009 and 2010, achieving record growth. This is largely as a result of exceptionally rapid expansion in the mobile sector over the past few years, and the launch of an additional mobile service in 2008, the Botswana Telecommunication Corporation's 'BeMobile'. The high penetration of mobile phones in Botswana is largely as a result of their easier availability compared to fixed line phone services, which are solely provided by the Botswana Telecommunications Corporation.

The convergence of networks where multiple and complex services are offered on a single platform is opening up new opportunities in the industry, as operators possess a wider scope for designing communications services around the actual needs of users. This should allow new and innovative services to emerge beyond voice, bring convenient and affordable services to users and generate value for operators.

BOTSWANA TELE-COMMUNICATIONS CORPORATION

The Botswana Telecommunications Corporation (BTC) is a public corporation constituted under the BTC Act of 1980 and charged with providing, developing, operating and managing the country's national and international fixed line and other telecommunications services on sound commercial lines. Competition was introduced through the enacting of the Telecommunications Act and Botswana Telecommunications Corporation (Amendment) Act, both of 1996. Following the further liberalisation of the sector, BTC was awarded a Public Telecommunications Operator (PTO) licence in 2007.

BTC's telecommunications infrastructure is one of the most modern in Africa. From just 6 500 access lines in 1980, provided mostly by electro-mechanical switches linked by analogue radio microwave systems, the corporation currently boasts more than 142 282 access lines connected by digital and soft switches, IP backbone, fibre optic and SDH radio links.

BTC is currently the only fixed line operator in Botswana, and provides the national backbone to all other operators in the country. Until recently its core business comprised voice and data services through a broad spectrum of modern network platforms. In 2008 the corporation launched its mobile service under the brand name 'beMobile', making it the third mobile service operator in the country.

At present, BTC provides both national and international voice telephony, toll free services, public payphones, Internet wholesale access, data services including leased circuits, private wires, very small aperture terminals (VSATs), managed networks and switched data services, and customer equipment, among other services.

Privatisation and future plans

Along with fixed-line operators worldwide, BTC faces the challenge of maintaining revenues in view of steeper competition and new technologies. The corporation has thus been restructured and its focus redirected in order to increase its competitiveness and efficiency. Progress has been made on the development of a transaction structure and implementation plan for the privatisation of BTC, with government consulting other stakeholders on the proposals that have been submitted.

BTC's current strategy is focused on three growth areas: voice, data and Internet. New services will focus on fixed/wireless/mobile/Internet convergence, as well as virtual private networks and advanced data services. The goal is to construct a next generation network with a common platform for services that merge fixed-line and mobile communications, otherwise known as fixed mobile convergence. Such a network is expected to handle diverse customer services, provide mobility on secure platforms and deliver superior yet cost-effective services.

COMMUNICATIONS INITIATIVES

Extensive capital programme are underway to improve both national and international network performance and connectivity as well as the overall development of ICT in Botswana. A national high capacity broadband telecommunications backbone ring infrastructure has been completed, with the Trans-Kalahari fibre optic ring connecting major centres across the country. This gives Botswana a fully resilient core ICT backbone connecting to similar networks in neighbouring Southern African Development Community (SADC) countries, and a communications network that matches the best internationally.

Global connectivity continues to expand via leased capacity on the existing SAT3 undersea cable system. Furthermore, connectivity has been improved through investments made by government and BTC in various undersea connectivity projects, such as the East African Submarine Cable System (EASSy) and the West Africa Cable System (WACS). Taken together, these projects are having a positive effect on the price of telecommunications as well as availability of bandwidth. This will help in establishing Botswana as a regional traffic hub and should prove significant for companies looking for a telecommunications infrastructure that is able to meet their current and future ICT needs.

MOBILE OPERATORS

The Botswana Telecommunication Corporation's (BTC's) monopoly on the provision of telecommunications was repealed in 1996 through an amendment of the BTC Act and indirect competition introduced through two mobile joint venture consortiums, Mascom Wireless Botswana and Vista Communications (now Orange Botswana).

According to the Communications Regulators' Association of Southern Africa (CRASA) in its country report on Botswana, the number of mobile phone subscribers rose by 60 percent between March 2008 and March 2009. Furthermore, the mobile subscriber base grew by 26.1 percent to 2.36 million users between March 2009 and 2010.

Mascom began operating in Botswana in February 1998 and by March 2010 had some 1.35 million subscribers. Mascom has GPRS/EDGE network coverage that spans 90 percent of the population, as well as 3G/HSDPA covering the city of Gaborone. Vista launched in Botswana in 1998 and was re-branded Orange Botswana in March 2003, with 51 percent France Telecom and 49 percent local shareholding.

Both Mascom and Orange have been issued with service-neutral licences by the Botswana Telecommunications Authority (BTA), allowing them to operate fixed line telephone services along with BTC. This will help reduce congestion at BTC and give mobile operators the opportunity to expand coverage by creating their own infrastructure.

In Botswana, the rapid growth of mobile services over fixed-line operators is largely due to the ability and speed of cellular operators to meet the population's need for basic voice services, particularly in rural areas. Cellphones are also more affordable due to the availability of low-priced SIM cards; low-priced, second-hand or reconditioned handsets; prepaid packages that require minimal outbound calling; airtime credit transfers and free 'call-me' text messages

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Recently released data indicates that Botswana has approximately 133 mobile subscribers per 100 members of the population, a statistic that is made possible by the fact that many subscribers hold and operate more than one SIM card.

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In 2007 BTC was granted a 15-year service neutral license, which allows it to operate fixed, mobile and Internet services and thus compete with both Mascom and Orange in the cellular phone industry. In 2008 BTC launched its mobile service under the brand name 'beMobile', which moved quickly to challenge the two main players that had been active since 1998.

The Botswana Telecommunications Authority (BTA) estimates that by March 2010, Mascom Wireless accounted for 57 percent or 1.35 million subscribers, Orange Botswana 37 percent or 874 462 subscribers and be Mobile 141 804 subscribers. The three mobile players are aggressively expanding their networks to rural areas, while the gradual drop in handset prices and emergence of multi-SIM card

phones is enhancing connectivity.

RURAL TELE-COMMUNICATIONS

The government-funded Rural Telecommunications Programme has helped bring telecommunications services to rural areas, based on the principle of universal access. The Nteletsa programme has since 1999 seen thousands of rural Batswana and over 227 villages connected to the fixed-line network.

The second phase of the Rural Telecommunications Development Strategy, Nteletsa II, is being implemented through the Department of Telecommunications and Postal Services, using both fixed-line and mobile technologies. The new strategy replaces the old format where the Botswana Telecommunications Corporation (BTC) was the sole supplier of government-funded rural telecommunications, opening the field to both established and new telecommunications operators. The tender for Nteletsa II was won by BTC and Mascom Wireless Botswana.

Designed to deliver telephony services to 197 villages by the end of 2011, implementation of Nteletsa II has begun with 103 villages. The hallmark of this project is the provision of Kitsong Centres, which will provide facilities such as computers, internet, fax and photocopying services, in villages that are covered by Nteletsa II in partnership with local communities.

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A key goal of the Connecting Communities Programme is to provide residents of rural, remote and urban communities with affordable access to computers and the Internet. The implementation of Kitsong Centres is important in enabling these communities to access e-government and other related ICT services. During NDP 10, the Kitsong Centres implementation strategy will be formulated in order to guide the delivery of all shared communications services.

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RADIO & TELEVISION

Public television and radio services are the responsibility of the Department for Broadcasting Services, which is a member of the Southern African Broadcasting Association (SABA), and falls under the Ministry of Communications, Science and Technology. The department consists of Radio Botswana (RB) and Botswana Television (Btv).

Radio Botswana comprises two radio stations, namely RB1 and the first commercial channel RB2, which was introduced in April 1992 to cater for the business community and the youth. Providing a 24-hour service, RB2's broadcasts consist primarily of music, with sports round-ups and news bulletins also featured.

In 2007 the National Broadcasting Board (NBB) issued national FM radio licenses to three radio stations: Yarona FM, Gabz FM and new entry in the market, Duma FM, bringing the number of national radio stations to five. Previously there were just two private radio stations, Yarona FM 106.6 and Gabz FM 96.2, which broadcast to Gaborone and surrounding areas.

The licensing of three private national radio stations is an important step in diversifying Botswana's broadcasting sector, and will enable Batswana in parts of the country other than Gaborone to have access to diverse sources of education, information and entertainment. In addition to bringing about greater competition in the industry, indigenous culture is to be promoted as the license conditions and regulations emphasise local content.

Btv, the country's public television broadcaster, was launched in July 2000. Other television broadcasters include Gaborone Broadcasting Corporation, which was issued with a national free-to-air licence, while Gateway TV, Monumotapa TV and Black Earth Communications have been issued with pay television licences. In addition, the privately-owned South African-based satellite television broadcaster, MultiChoice, is authorised to beam its DSTV channels within Botswana's jurisdiction. Satellite station BESTV has also been licensed.

With broadcasts in both English and Setswana, Btv's programming encompasses most genres, with the current emphasis on sports, news, music and talk shows, and the introduction of additional drama, documentaries, game shows, local comedy and children's shows planned. Btv News aims to present a fair, accurate and balanced report of local, regional and international affairs.

While Btv aims to increase local content to 60 percent, this currently stands at 20 percent, as it is costlier to produce in-house programmes than to buy foreign productions. Criteria have been developed that will be used to encourage local producers to sell programmes to media houses, especially Btv. This should give Batswana with the requisite skills the opportunity to contribute to the growth of the industry. The setting up of the Media Studies Department at the University of Botswana has had a significant impact on the problem of the shortage of media personnel in the country.

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Government is considering establishing a second television channel during NDP 10, which will offer viewers a wider choice as well as giving the private sector another platform from which to advertise their products.

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With the ICT Policy aiming to achieve countrywide coverage by national radio and television, the multi-million Pula Radio and TV Transmitter Expansion Project aimed at extending the terrestrial transmission network to 96 percent of the population and 65 percent of Botswana's geographical area will be completed during NDP 10.

POSTAL SERVICES

Postal and Telecommunications services were separated in 1980, with the postal service transformed from a government department into a semi-autonomous parastatal, the Botswana Postal Services, in 1989. Becoming a commercial entity and renamed BotswanaPost in 2000, it continues to operate a postal services network across Botswana through its 119 post offices and 78 postal agencies, the latter being run by Village Development Committees with the assistance of BotswanaPost. The target for mail delivery to major towns and villages is the next day, and within three to four days for more remote areas.

Botswana Couriers is a 100 percent owned subsidiary of BotswanaPost offering an across-town service three to four times a day within Gaborone and Francistown; a regional same-day door-to-door service between Gaborone and Francistown, including Palapye and Mahalapye; and a nationwide overnight service to all major centres in Botswana.

BotswanaPost faces the challenge of doing business in a very competitive industry where

new operators are entering the profitable segments of the industry, while still attempting to operate within the context of a universal service provider. Privatisation options for the parastatal are being considered with input from PEEPA. In the meantime, BotswanaPost has embarked on an organisational restructuring exercise to help it achieve greater sustainability, with its 'Pinagare' strategic plan spanning the period 2006-2011. Kitsong centres, which provide a hub for e-commerce within communities in addition to wider e-government services, are currently being expanded to post offices across Botswana.

During NDP 10, government intends to improve the postal communications network by refurbishing and developing postal offices throughout the country. This will improve mail delivery efficiency and increase public access to postal products and services. The introduction of financial and electronic services will be another key strategy for growth, with the sector being able to take advantage of opportunities created by ICT to improve customer service and enhance communications products. This will expedite faster payment transactions, particularly the payment of social benefits. Furthermore, the establishment of a National Postal Code and Addressing system will improve postal service delivery.

While the Postal Policy has laid down clear sector reforms with universal service obligation having been assigned to BotswanaPost, a programme that will assist in providing service to the rural and underserved areas will be developed. Provision of universal postal services to these areas shall be guided by the Rural Postal Services Strategy that will be developed during NDP 10.

BotswanaPost products and services

BotswanaPost's range of services and products includes letter and parcel mail, permit mail, bulk mail, hybrid mail, business reply services, pickup and delivery, money and postal orders, private bags, post office boxes, franking machines, stamps and philately. The Express Mail Service (EMS) uses the 'track and trace' system, ensuring speedy delivery within Botswana as well as more than 65 countries worldwide.

Business and Communications Centres offer Internet and e-mail; desk top publishing facilities (typing, design of presentations, event programmes, etc); business services (faxing, binding, laminating, scanning, copying, etc); stationery sales; sale of niche market tourist artefacts/curios; and sale of packaging material. BotswanaPost also provides a wide range of agency services on behalf of government departments, parastatals and the private sector.

PRINT MEDIA

In an environment where the growth of private media is encouraged, Botswana has seen the emergence of a variety of print media. There are around 13 commercial papers privately owned by diverse business interests (Mmegi/The Reporter, Botswana Daily News, Botswana Guardian, The Voice, The Botswana Gazette, The Midweek Sun, The Sunday Tribune, Monitor, Echo, The Paparazzi, The Mirror, The Botswana Advertiser and Sunday Standard). There are also some smaller community newspapers, dozens of magazines and trade journals.

The Press Division of the Department of Information Services comprises the Botswana Press Agency (BOPA) and is responsible for publishing the Daily News and Kutlwano Magazine. Published five days per week from Monday to Friday, the Daily News was the only daily newspaper in Botswana before the arrival of the privately-owned Mmegi in 2003.

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During NDP 10 it is intended to increase the distribution of national newspapers from the current estimated 50 locations to all communities that have at least 2 000 inhabitants. All national print media will be more widely available in the country, and a distribution system encompassing public and private sector print media will be developed.

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Charged with disseminating government policy and information, the Department of Government Printing and Publishing Services provides a comprehensive and secure printing service to all government ministries and departments as well as serving as the government publisher and distributor. Included among some of the important publications printed are the Government Gazette, Statute Law Volumes and Daily News.

The establishment of the Botswana Chapter of the Media Institute of Southern Africa and setting up of the Press Council of Botswana are some of the developments that have contributed to enhancing professionalism and efficiency in the sector. In recognition of the media as a partner in development, government set up the Media Advisory Council, which is a subcommittee of the High Level Consultative Council. The Media Practitioners' Bill, which seeks to give legal recognition to the Press Council as a self-regulating body, has been drafted.

A Long Term Vision for Botswana

LONG TERM VISION FOR BOTSWANA
VISION 2016

VISION 2016

Towards Prosperity For All

WHAT IS VISION 2016?

Vision 2016 is a Botswana blueprint that seeks to propel Botswana's socio-economic and political development into that of a competitive, winning and prosperous nation. Vision 2016 reflects as closely as possible the aspirations of Batswana about their long term future. It is a result of extensive consultation through a Presidential Task Force appointed in 1996.

Sesigo
BOTSWANA e-PUBLIC LIBRARIES
Sefalana sa kitso



Sesigo is a global development project, funded by the Bill and Melinda Gates Foundation. It is a partnership between ACHAP, as the grantee organization of the Gates Foundation and the Government of Botswana represented by the Ministry of Youth, Sport and Culture (MYSC). The project is implemented by the Botswana National Library Services, a department of MYSC.

Sesigo allows meaningful access to computers and internet to citizens so that they can benefit from modern ICT'S and information services. It also works at transforming public libraries to enable them offer a full range of services and have a measurable impact on the lives of users both socially and economically. The project avails a platform where all can access, at no-cost; ICT services at public libraries and thus extend the reach of the e-government portal by providing e-access points. The project trains library staff on the use of computers, basic troubleshooting as well as how computers can be used to generate new library services and make public libraries the e-government access platform. All professionally trained librarians are also trained to become project advocates and carry out monitoring and evaluation of library services. They further train members of the public and 70,000 users are projected to have been trained at the end of the project.

The four year project started off as a pilot in 2008 and due to end in June 2013. At the end of the four year period Sesigo hopes to have achieved the following;

- Equipped 78 libraries with computers and internet
- Trained all 648 library staff
- Trained 70,000 members of the public throughout all public libraries in basic ICT
- 478 computer sets will be deployed in all public libraries

The project has a national footprint, covering every district (rural and urban) in Botswana. The medium of delivery is the entire public library system network: All twenty-six branch libraries, nine community libraries, and forty-two of the sixty-nine village reading rooms will be equipped with computers and internet.

Sesigo aims to achieve the following objectives:

To enable public access to computers and Internet services in public libraries and ensure they are widely used.

To empower library staff to be effective library champions and information workers in the communities they serve

To build partnerships that strengthens the library system and information society programming in libraries.

To position libraries as agents of change for the individuals and communities they serve

To satisfy Batswana's information needs and ensure useful information is available to improve their quality of life, in areas such as health, agriculture, education and e-government.

To position libraries as strong cultural partners for preservation of Botswana's cultural heritage



Contact Us at: Plot 61920, Block C, Showgrounds Office Park, Gaborone. Private Bag X033, Gaborone.

Telephone: 3697200 Fax: 3190275 website: www.sesigo.org.bw

SCIENCE AND TECHNOLOGY

Investment in research and development continues, as a means of fostering a technology-driven and knowledge-based economy characterised by improved production techniques and enhanced economic diversification. This drive has been led by the Ministry of Communications, Science and Technology. Established in 2002, the ministry has subsequently been restructured and transformed into the Ministry of Infrastructure, Science and Technology.

The Department of Research, Science and Technology (DRST) coordinates and provides an enabling environment for research in science and technology. A specialised unit within the DRST is tasked with

In this knowledge-based era, Botswana's ability to take advantage of new cost-effective technologies is necessary for the transformation of its economy into one that is innovative, private sector-led and diversified.

DEVELOPMENT OF PROTOTYPE TECHNOLOGIES



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RURAL INDUSTRIES PROMOTIONS COMPANY (BOTSWANA)

"Your Local Technology People"

ISO 9001 SABS

www.ripco.bw

RURAL INDUSTRIES PROMOTIONS COMPANY (BOTSWANA)

Corporate Business Strategy

The Rural Industries Promotions Company (Botswana is certified to the South African Bureau of Standards ISO 9001: 2008 standard

Mandate

To promote industrial development and techno-preneurship through applied research.

Mission

Rural Industries Promotions Company (Botswana) shall deliver Research and Development products to support industrial and techno-preneurial development in Botswana.

Vision

Rural Industries Promotions Company (Botswana) shall be the leading techno-preneurship institute.

Organisational Objectives

» To research, develop, innovate, source and adapt technologies
» To commercialise and transfer technologies
» To provide knowledge based services
» To undertake contract research and development in partnership with stakeholders

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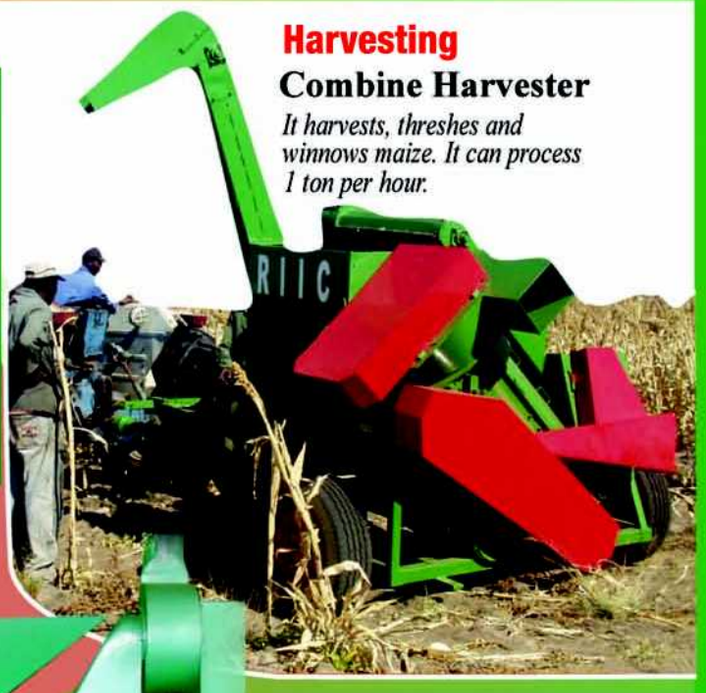
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Maun - Tel: (+267) 6863190 Fax: (+267) 6800872
Palapye - Tel: (+267) 4920078 Fax: (+267) 4922934

Harvesting

Combine Harvester

It harvests, threshes and winnows maize. It can process 1 ton per hour.



Milling

Dehuller and Hammermill:

Dehullers remove bran from sorghum. Hammermill can process 500kg/h of sorghum.



Grain Grinder:

The machine grinds various grains such as sorghum, maize, millet, etc into flour or grit. It can grind 75kg of maize and sorghum, and 136kg of maize rice per hour



Fodder Processor

Fodder Processor *processes lucerne, stalks and grains into livestock feed. Can process 200kg of feed per hour.*



Water Treatment

RIPCO (B) constructs wetlands for institutions and households to produce effluent for use in different applications and improve water conservation. Treated water can be used for irrigation and landscaping. The company also provides technical support and advice on maintenance requirements



Constructed Wetlands are equatic systems for treatment of wastewater. They can treat very small flows for households to very large flows for municipal systems.

ensuring that the country's policies, legislation and curricula adequately protect intellectual property rights related to research, science and technology.

Following the establishment of the National Commission for Science and Technology, a National Research, Science and Technology Plan was commissioned to guide the implementation of the Science and Technology Policy. However, on completion of the plan in 2005, it became evident that the Science and Technology Policy of 1998 would need to be reviewed in order to make it more relevant to current issues.

The Research, Science, Technology and Innovation Strategy

The Botswana National Research, Science and Technology (RST) Plan developed during National Development Plan 9 (NDP 9) reviewed the science and technology landscape of the country and identified priority areas for research. During NDP 10, the strategy that was developed for the plan will be implemented. Project components will include, among others, human resource development for scientists and technologists, and consultancies for policy review and formulation, such as the Science and Technology Policy for Botswana and the Indigenous Knowledge System.

Atomic energy

Atomic energy is used in Botswana in the areas of medicine, agriculture, research and industry. Botswana complies with the International Atomic Energy Agency's basic safety standards and accedes to NPT Additional Protocol and Safeguards Agreements. The Radiation Protection Act of 2006 provides for the safe use of atomic energy and nuclear technology in Botswana, while a Radiation Protection Board licenses and monitors all users of atomic energy sources in the country.

The Radiation Protection Inspectorate regulates the use of atomic energy and nuclear technology, and disseminates information to both users and the public. During NDP 10, the inspectorate will play a pivotal role in the provision of technical and advisory support services to all public and private sector organisations implementing national projects funded through the Technical Cooperation Fund of the International Atomic Energy Agency (IAEA).

FOSTERING SCIENCE & TECHNOLOGY

The development of human resources in the areas of research, science and technology is an essential step in meeting the needs of the knowledge and information society and attracting foreign direct investment in science and technology.

Being set up in Gaborone by the Botswana Development Corporation (BDC), the Botswana Innovation Hub (BIH) is a Science and Technology Park aiming to connect high-technology innovators, market experts and capital providers to transform ideas into viable business ventures. It will bring together research and development (R&D) institutions, industry leaders and universities to create synergies for innovative output. It is anticipated that the technical skills and training provided by the hub will result in a more productive labour force, thereby improving Botswana's ability to compete in the global market.

The Innovation Hub aims to provide a one-stop shop 'plug-and-play' environment, with office space as well as conference facilities, laboratory space for R&D activities, recreational facilities and a cafeteria. Companies will be provided with flexible premises and quality business services, resulting in a truly world-class business environment that complements the high-tech image of companies operating in the hub.

The four main focus areas of BIH include:

- Information Communications Technologies (ICT) and ICT-enabled services
- Mining Technologies
- Sustainable Energy and the Environment
- Biotechnology

In addition, Knowledge Intensive Business Services (KIBS) will support all sectors.

The master plan of the Hub was approved in September 2009, and construction began in 2010, with some facilities scheduled for completion in the first half of 2011. An important component of the innovation hub will be the business incubator, which will assist small start-up companies to transfer their ideas into marketable projects.

The establishment of the Botswana International University of Science and Technology (BIUST) in Palapye is a major milestone in government's efforts to create a knowledge-based economy in Botswana. BIUST should help to increase access to tertiary education and facilitate the development of Botswana's human resources in skills and competencies that will promote research and innovation. The new university will seek to partner with industry as well as local and international institutions to facilitate exchange programmes and work attachments to ensure relevance to the world of work for both staff and students.

The first phase (the Founding Development) of the project was scheduled for completion in December 2010. BIUST is expected to begin operating in March 2011 with an enrolment of 250 students and plans to expand to a total of 6 000 students. Courses offered will be research-based, and will initially operate within four colleges – sciences, engineering, technology and business and general education. Facilities will include a library, laboratories, staff houses and halls of residence. An Industrial Park will provide internship opportunities and host international researchers as well as businesses from both the commercial and industrial sectors.

INSTITUTIONS

Botswana's existing research, science and technology institutions are being restructured and consolidated to better deploy scarce expertise and improve coordination of research efforts. The long-term plan is to create centres of excellence with a clear and focused research mandate that will do away with the duplication of efforts.

As such, the Botswana Technology Centre (BOTEC) will be merged with Rural Industries Promotion Company (RIPCO) under the Ministry of Infrastructure, Science and Technology. In addition, the National Food Technology Research Centre (NFTRC) has been transferred to the Ministry of Agriculture as its mandate is directly relevant to the role of that Ministry.

Botswana Technology Centre

The Botswana Technology Centre (BOTEC) serves as a national focal point for the science and technology research and development. It also disseminates information in this regard to policy makers, organisations, companies and individuals, and develops ready-for-market prototype technologies. The centre has been successful in civil engineering technologies, electronic products, architectural designs and renewable energy products aimed at establishing the viability of harnessing solar energy for both domestic and industrial use.

BOTEC developed a Community User Information System (CUIS) project during NDP 9 to provide communities in rural areas with access to integrated e-mail and online information. This has been successfully piloted through the setting up of three tele-centres – known as Kitsong Centres – in Gumare, Hukuntsi and Letlhakeng. The Kitsong Centre project has also seen the connection of 235 secondary schools to the Internet in collaboration with BotswanaPost and the Department of Telecommunications and Postal Services.

In addition, the centre has come up with a feasibility study on telemedicine as a possible solution to Botswana's health problems. Tele-simulation and tele-mentoring for doctors on fundamentals of laparoscopic surgery is a pilot project which assists doctors in Gaborone's Princes Marina Hospital and the University of Toronto Hospital in Canada in a mentorship programme on performing laparoscopic procedures.

BOTEC is also involved in the development of the Business Incubation Centre for the Botswana Innovation Hub. Other initiatives include the Solar Chimney Optimisation project and the upgrading of BOTEC headquarters.

Rural Industries Promotions Company

Established in 1974, the Rural Industries Promotions Company (Botswana) (RIPCO B) aims to undertake industrial development and 'techno-preneurship' through applied research. The company is also involved in the dissemination of its research results in the form of finished products and services to improve the living standards of Batswana nationwide.

Headquartered in Gaborone, the capital of Botswana, RIPCO (B) implements its mandate through the Rural Industries Innovation Centre (RIIC) in Kanye within the context of the following research areas: design, manufacturing and engineering; information and communication technology; materials; renewable energy; and water and environment.

RIPCO (B)'s technological breakthroughs are geared towards poverty alleviation, job creation and economic diversification. These initiatives fulfil the view that investment in science and technology should be measured through its impact on the socioeconomic imperatives of the people.

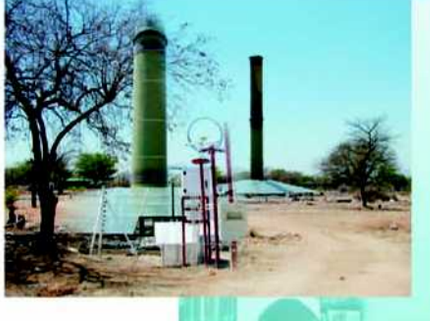
BOTEC
Botswana Technology Centre
Delivering Tomorrow's Solutions Today

Delivering Tomorrow's Solutions Today

Our research projects:



Kgalagadi Sand Building Block (KSBB)
The KSBB R&D project seeks to develop design mixes for a building block using Kgalagadi sand as the main raw material, calcrete and flyash-extended cement as a binder. The tangible end product of the project shall be a masonry unit, complete with its specifications and methods of production and application.



The Solar Chimney
The air under the glass collector at the base of the chimney is heated by greenhouse effect. The hot air then rises up the chimney and drives a wind turbine to generate electricity. Ongoing research will prove or disprove the concept of using a short solar chimney with a ducted turbine to generate electricity.



Solar Photovoltaic (PV) Street Light
Powered by a solar panel and a battery, this system can be used in areas where grid electricity is not available.



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The company has been successful in the design, manufacturing and engineering of agricultural technologies geared at supporting both the livestock and arable subsectors. Major breakthroughs from this initiative include new sorghum milling technology, which has revolutionised the development of a small-scale decentralised milling industry in Botswana. The hammermill can process 500 kilograms of sorghum per hour, while the grain grinder is able to grind 75 kilograms of maize and sorghum and 136 kilograms of maize rice per hour.

RIPCO (B) has proven its mettle by putting up a two-ton capacity milling plant in Pitsane for Honey Guide (Pty) Ltd, a commercial project that produces sorghum flour for retailing. Related agricultural technologies are the animal feed processing machines such as the fodder processor (which can process lucerne, stalks and grains into livestock feed at a rate of 200 kilograms per hour) and a chaff cutter, sorghum thresher and combine harvester, which harvests, threshes and winnows maize at a rate of 1 ton per hour.

In terms of water and the environment, RIPCO (B) has developed a wetland treatment plant which treats wastewater for different applications, such as irrigation or landscaping, and improves water conservation. To this end, the company has put up five installations for various uses in different areas in Botswana, as well as two installations in Pandamatenga and Shakawe. Additional installations are anticipated, with ever growing interest in the technology.

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Constructed wetlands are aquatic wastewater treatment systems, which are able to treat small household flows as well as very large flows for municipal systems.

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On renewable energy, RIPCO (B) has developed a photovoltaic pump which uses solar radiation to lift water from wells and boreholes. A project on street lighting is being piloted at RIIC with the objective of promoting the use of solar energy for lighting. Planned research work on information and communications technology includes access technology and artificial intelligence (cattle tracking and management). In addition, RIPCO (B) has put up an industrial satellite service centre in Palapye, with another centre being constructed in Kanye.

National Food Technology Research Centre

Begun in 1984 as a pilot project funded by the United States Agency for International Development (USAID), today the National Food Technology Research Centre (NFTRC) engages in research and development activities, providing technical support to Botswana's growing food industry in the areas of food hygiene, quality assurance, process design and nutrition. The centre's mission is to generate food technologies that enhance economic diversification, food security and quality through sustained and user-focused research and development.

The NFTRC has developed useful programmes to address the national challenges of food security, poverty and HIV/AIDS, supporting the home-based care system by providing information and materials on good nutrition and working to develop food products that will help mitigate nutritional problems association with HIV/AIDS. The centre has developed more than 50 local food products, some of which are now household brands – such as 'Tsa Bana', an infant and child food product – as well as other common brands ranging from ginger drinks to peanut butter.

During NDP 10, NFTRC will continue to carry out several projects, including food product development, use of nuclear technology in nutrition research, human resource development and technology research and transfer.

METEOROLOGICAL SERVICES

The provision of adequate, reliable and accurate meteorological information is crucial for proper planning to reduce the impact of climate-related calamities, and impacts on diverse socioeconomic areas such as disaster management, drought monitoring and water resources planning, aviation, agricultural production and tourism. Part of the Ministry of Environment, Wildlife and Tourism, the Department of Meteorological Services operates a network of meteorological observation stations countrywide, providing weather and climate information to the general public and other weather sensitive sectors.

As a member of the World Meteorological Organisation (WMO) and the Southern African Development Community (SADC), Botswana continues to collaborate and cooperate with other national meteorological services in Africa and elsewhere to enhance the development of meteorology and the application of its products and services. This is done through WMO initiatives such as World Weather Watch (WWW), World Climate Programme (WCP), and Atmospheric Research and Environment Programme (AREP). Under AREP, a regional ozone observing station has been established in Maun. The information from the station forms part of the global data collected from a network of such stations worldwide.

The National Meteorological Services Act provides for the legal status of the Meteorological Services sector as well as catering for the establishment of a designated national authority. Legal empowerment of Botswana's meteorological services will facilitate the implementation of the Clean Development Mechanism under Article 12 of the Kyoto Protocol. Furthermore, a national authority will be able to register and assess whether project proposals meet the set sustainable development criteria before approval to facilitate carbon trading. It will also provide and maintain the national meteorological telecommunication system, which will be connected to the global telecommunications systems of the WMO as well as the Aeronautical Fixed Telecommunications Network of the International Civil Aviation Organisation.

Expansion of the network is vital in order to analyse complex weather patterns and provide greater accuracy in the prediction and severity thereof. In order to decrease data gaps and contribute to the exchange of data in the sub-region and among other WMO member countries, an additional three synoptic stations are being built at Sua Pan, Ncojane and Lephepe.

Work is currently ongoing on the implementation of capacity building project activities co-funded by the Botswana government and SIDA, as well as institutional strengthening activities with the assistance of the Swedish Metrological and Hydrological Institute (SMHI) for the implementation of the Montreal Protocol on ozone depleting substances.

BANKING AND FINANCIAL SERVICES

Botswana offers a broad range of financial institutions, products and services, which comprise the central bank, 11 commercial banks and 20 non-bank financial institutions, including four development finance institutions and one building society. Other components of the sector include the Botswana Stock Exchange (BSE), three stockbroking firms, and an ever-increasing number of insurance companies, investment advisors, pension funds, asset managers and administrators, bureaux de change and micro-lenders.

Important developments in recent years include the development of a National Clearance and Settlement

Having proven itself remarkably resilient in the face of the global financial and economic crisis, Botswana's financial sector has great potential as an alternative source of economic growth and diversification.



FAIRGROUNDS FINANCIAL CENTRE, GABORONE

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System and the establishment of the Non-Bank Financial Institutions Regulatory Authority (NBFIRA), which commenced operations on 1 April 2008. NBFIRA is expected to close the remaining regulatory and supervisory gaps in the financial sector, including the regulatory oversight of insurance and asset management activities, which will further enhance the soundness and stability of the financial system. The Bank of Botswana (BoB) and NBFIRA are cooperating in areas of mutual interest, including the further development of financial sector statistics.

Other developments saw the drafting of the Financial Reporting Act to replace the Botswana Institute of Accountants Act (1988). This establishes the Botswana Accounting Oversight Board as an independent regulatory body to oversee the accounting and auditing profession, with the focus on reporting financial matters of Public Interest Entities.

Growth in the financial sector slowed markedly in 2009, after many years in which Finance and Business Services had been one of the fastest growing sectors of the economy. While the slowdown mainly affected banks, it also dampened other financial activities such as insurance.

Despite the slowdown in the sector, there have been no instances of bank failures. On the contrary, the number of commercial banks increased to 11 with the addition of two new domestic banks, ABN AMRO and Banc ABC, in 2009. The BoB will continue to apply appropriate supervisory standards over the financial institutions under its jurisdiction to pre-empt any institutional fallouts which could constrain prospects for economic growth and diversification.

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In spite of the financial crisis in the global economy, Botswana's banking sector has not seen any banks fail; instead the number of banks has increased to 11 in the past two years.

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Botswana's banking system registered signs of recovery in the first half of 2010, with credit growth on the rise. This has mainly been driven by renewed lending to the private business sector, with banks being more cautious with respect to household lending. A positive development in the first quarter of 2010 is that the arrears rate has fallen, albeit slightly, from 7.5 percent to 7.1 percent of overall credit, and from 10.2 percent to 10.0 percent on household loans.

International ratings

International rating agencies, Moody's Investors' Service (Moody's) and Standard and Poor's (S&P), have for the better part of the past decade conferred investment grade ratings on Botswana. As a result of rising budget deficits, concerns regarding fiscal sustainability have seen these ratings downgraded somewhat, from an A to an -A by S&P, although the outlook remains 'stable' due to a strong public sector external balance, with the credit risk revised to A2 by Moody's. Nevertheless, a strong commitment by government to undertake effective public finance reform, combined with the commitment in the 2010 Budget to achieve a balanced budget by 2012, should help to improve the ratings outlook.

MONETARY POLICY

Monetary, exchange rate and fiscal policies are used to guide the direction of the economy and promote growth while maintaining overall economic balance. The main aim of monetary policy in Botswana continues to be price stability, defined as a sustainable, low and predictable level of inflation, which helps to maintain international competitiveness.

The Bank of Botswana's monetary policy framework was updated in 2008 by abandoning the annual inflation objective and replacing it with the medium-term objective. The medium-term, defined as a three-year time horizon over which inflation is forecast, is considered a reasonable period for monetary policy to take effect. Moreover, it gives the bank time to evaluate the monetary policy framework and make appropriate changes where they are required to achieve the price stability objective.

According to the BIFM Economic Review of the second quarter of 2010, after an aggressive period of rate cutting between late 2008 and the end of 2009, during which the Bank Rate came down by 5.5 percent, the Bank of Botswana (BoB) kept interest rates on hold during the first six months of 2010. BoB's monetary policy framework makes it clear that it is the expected medium-term path of inflation relative to the monetary policy objective that determines the stance of monetary policy, not short-term movements in inflation.

Inflation and exchange rate developments

During the second quarter of 2010, inflation rose from 5.9 percent to 7.7 percent. Whereas inflation fell within the BoB's inflation objective range of 3 to 6 percent for a few months at the end of 2009 and early 2010, it has since risen significantly above the upper end of this range.

Nevertheless, underlying inflationary pressures remain low. Internationally, inflation in the major developed economies is forecast to remain below 1.5 percent during 2010 and 2011, while in South Africa inflation is forecast to remain within the country's inflation target range of 3 to 6 percent. Hence import price pressures should remain modest up to the end of 2011.

While Botswana's crawling peg exchange rate regime is expected to increase imported inflation, in pula terms, it should remain below 6 percent. Domestically, demand pressures from households, firms and government are likely to remain subdued, and should therefore not add to inflation. The main risk comes from potential cost pressures, which could include wage increases, further increases in electricity tariffs and international fuel prices. Overall, Botswana's inflation is forecast to remain around 7.5 to 8 percent for the next 12 months, but should fall back below 6 percent by the middle of 2011.

The rand/pula exchange rate was below R1.10 for much of 2010, a level that is almost unprecedented over the past 30 years. The apparent weakening of the pula has raised concerns that this might increase import prices and inflation. In the longer-term, however, the exchange rate policy governing the pula basket mechanism - such as the current crawling peg - probably has more influence on the value of the pula than bilateral cross exchange rates.

It is therefore expected that the pula will weaken further against the rand up to the first quarter of 2011, but that it will not reach parity. Eventually the rand will weaken, and this will cause the pula to strengthen against

the rand, and most likely recover to above R1.10 by the end of 2011.

BANKING SECTOR

The banking sector remains sound, stable and healthy. Institutions consist of the central bank, 11 commercial banks and a growing number of investment and corporate finance institutions. Under the revised Banking Act of 1995, private sector banks have a great degree of flexibility in conducting their operations, and are run according to the international banking system of regulation, supervision and payments. The supervisory environment promotes proper risk management, together with sound corporate governance, transparency and full disclosure.

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In 2010, bank credit growth returned to healthy levels, with a welcome focus on business rather than household lending.

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The banking industry is becoming increasingly important to Botswana's economy and has experienced admirable growth over the past several years - an average of 9.9 percent per year in real terms between 1995/96 and 2005/06 compared to overall economic growth of 6.8 percent per year. The banking sector has also been a driving force behind the growth of the Botswana Stock Exchange (BSE), where it dominates market capitalisation. Despite a slowdown during 2009, the industry remained relatively insulated from the global financial crisis.

The efficiency of banking operations and the functioning of the payments system has undergone substantial improvements in the past few years. Banking operations, fund transfers and settlement transactions have been interlinked through interfacing the core banking system, Globus, with RTGS, SWIFT and the Electronic Clearing House (ECH).

CENTRAL BANK

Through ongoing banking supervision and regulatory activities, the Bank of Botswana (BoB) is responsible for promoting and maintaining monetary stability, an efficient payments mechanism and a sound and properly functioning domestic financial system. It provides banking services to government, commercial banks, selected public sector organisations, other central banks and internationally recognised agencies.

In line with government policy, the bank enables growth in the economy through a systematic and stabilising monetary policy. This requires the achievement of low and sustainable inflation which, together with fiscal, wage, trade and exchange rate policies, fosters macroeconomic stability. Other central bank services include ensuring the supply, circulation and high quality of currency in the form of notes and coins, formulating macroeconomic policies in consultation with government and managing the country's foreign exchange reserves.

The Bank of Botswana regulates and supervises banks and other financial institutions in accordance with the Banking Act of 1995. To this end, BoB enforces prudential standards with respect to capital adequacy, liquidity, asset quality and corporate governance, ensuring that such institutions maintain high professional standards in their operations.

The central bank also has a surveillance responsibility with regard to breaches of the Banking Act (CAP 46:04) by the public, and has specific responsibilities relating to



combating money laundering. As such, banks are required to adhere to 'know your customer' (KYC) provisions when opening accounts, retain appropriate records, report suspicious activities and cooperate fully with law enforcement agencies in an effort to combat financial crimes - money laundering in particular.

In order to manage excess liquidity in the domestic banking system, the Bank conducts open market operations to ensure that short-term interest rates, in particular yields on Bank of Botswana Certificates (BoBCs), are consistent with the monetary policy stance.

COMMERCIAL BANKS

Commercial banks in Botswana carry out all financial services, including normal commercial and retail activities, merchant banking, leasing and car and property finance.

For many years the banking market consisted of only two banks - Standard Chartered Bank Botswana and Barclays Bank of Botswana, which were both established in 1950. First National Bank of Botswana was established in 1991, taking over the operations of Bank of Credit and Commerce Botswana and subsequently acquiring Zimbank Botswana and the government-owned Financial Services Company. In 1992 Union Bank, a subsidiary of Standard Bank of South Africa, took over ANZ Grindlays and was renamed Stanbic Bank Botswana.

Other commercial banks comprise the Bank of Baroda, which opened in 2001, and Bank Gaborone Limited, which opened in September 2006. Capital Bank Limited, which was licensed in 2007, commenced operation in May 2008. The following year saw the addition of two new banks: ABN AMRO and Banc ABC.

NON-BANK FINANCIAL INSTITUTIONS

Non-bank financial institutions (NBFIs) supplement the role of commercial banks. These NBFIs include insurance companies, pension funds, asset managers and administrators, organised exchanges, securities dealers, insurance brokers and agents, investment advisors, specialised financiers and micro-lenders. In 2009, the number of non-bank entities in Botswana remained unchanged at 20.

There has been an upsurge in growth of new financial services in a variety of areas, with non-banks now dominating the financial sector. The need to supervise these institutions appropriately led to the drafting of the Non-Bank Financial Institutions Regulatory Authority (NBFIRA) Act, which has brought the supervision of all non-bank financial institutions and services, including insurance and asset management, as well as institutions registered under the Botswana International Financial Services Centre (IFSC), under one regulatory authority.

The Non-Bank Financial Institutions Regulatory Authority, which began operating in April 2008, ensures the soundness, sustainability and global competitiveness of non-bank financial sector activities that fall under its purview. It has the power to license, regulate and inspect, as well as initiate legal action on behalf of claimants who have suffered losses. Its powers also extend to the supervision of smaller operations, such as brokers and money lenders. However, in some cases the authority may make provision for a more arms-length approach, where qualifying institutions can be declared self-regulatory.

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NBFIRA has been tasked with regulating all non-banking financial entities in Botswana. This includes pension funds, asset managers, micro-lenders, insurance and collective investment undertakings (CIUs).

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DEVELOPMENT FINANCIAL INSTITUTIONS

Development Financial Institutions (DFIs) offer specialised services targeted to given economic sectors and areas of economic activity, providing loan facilities for a wide range of agricultural, commercial, service and industrial enterprises, including residential property services. DFIs in Botswana Comprise the Botswana Savings Bank, National Development Bank, Botswana Development Corporation and Citizen Entrepreneurial Development Agency, which is discussed under the chapter on '*Commerce & Industry*'.

Botswana Savings Bank

Botswana Savings Bank (BSB) was originally established in 1911 as a Post Office Savings Bank, and operated as part of the Department of Postal Services until 1982, when supervisory responsibilities were assumed by the Ministry of Finance and Development Planning. Renamed Botswana Savings Bank in 1985, at which time it had 87 826 accounts and a balance due to depositors of P4 643 513, BSB grew significantly to register 255 000 accounts by March 1991, with a balance due to depositors of P37 891 556.

The present day BSB was established by an act of parliament in 1992, when it became an independent financial institution, wholly-owned by government for the purpose of providing banking and financial services for all Batswana. It carries out its business according to sound commercial principles and in accordance with the Banking Act of 1995.

BSB's main operations include the collection of deposits from customers, the majority of whom are not catered for by the commercial banks. It has a number of savings products tailored to meet the needs of its different customers and offered through the country's postal services network, which reflects the long-standing business agency agreement between the two organisations. The partnership also provides an area of strength for BSB by virtue of its reach to customers nationwide.

The bank's growth has been financed over the years from internally generated funds - not PDSF loans - giving BSB total financing independence. BSB's charges for services rendered are minimal, with the majority being virtually free of charge. In recent years BSB has focused on developing its internal operating capacity through technological innovation, automation of processes and organisational restructuring, and has embarked on vigorous marketing and product development strategies. ATMs have been installed in some branches in order to increase access to financial services in rural areas.

Total assets/liabilities of the BSB rose by 16.1 percent in 2009, compared with 20.5 percent the previous year. Government has approved

the merger of the BSB with BotswanaPost under the Ministry of Transport and Communications.

National Development Bank

Established in 1963, the National Development Bank (NDB) is a self-sustaining financial institution that is owned by government and has been run on a commercial basis since restructuring in 1993. The bank offers a variety of financial services to the business community, in particular small, medium and large-scale enterprises, providing long-term loan finance at competitive fixed or linked interest rates while seeking to earn a satisfactory return on shareholder's funds. The bank's portfolio is diversified across various sectors, with loans provided to the commercial, property, agricultural and industrial sectors.

The bank currently plays a major role in the execution of the Agricultural Credit Guarantee Scheme (ACGS) and the CEDA Credit Guarantee Scheme (CEDA CGS). It also continues to administer the Citizen Contractors' Fund (CCF), although the fund is not very active as disbursements have ceased.

The ACGS is a scheme where the government, through NDB, guarantees dry-land crop farming loans to a maximum of 85 percent of the years' instalment in the event of a declared drought. The farmer and NDB pay a premium of 5 percent each for the instalment falling due in that year. The CEDA CGS allows Batswana with limited security to acquire loans guaranteed by government for up to 75 percent of the debt.

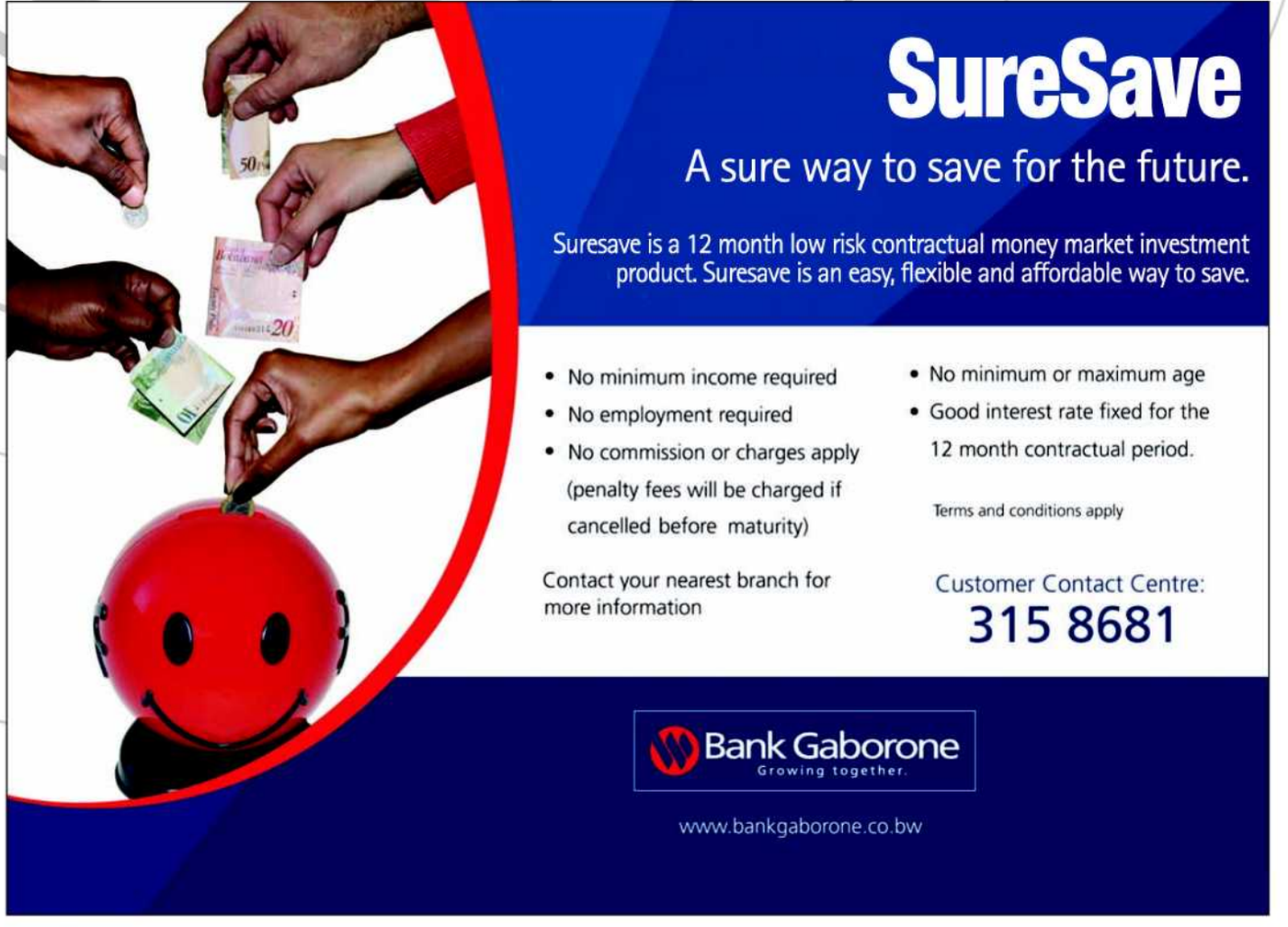
The NDB's asset growth was 11.6 percent in 2009, up from 10 percent in 2008. However, growth in lending was modest, at 2.4 percent compared with 32.8 percent in 2008, with increased cash and bank deposits being the main source of asset growth.

Work to develop a privatisation strategy for NDB has been completed and government is considering the proposed strategy and the associated divestiture action plan. While there are various possible options, a phased process whereby a strategic equity partner is brought in to restructure the bank prior to a subsequent IPO and flotation on the BSE would probably make the most sense.

Botswana Development Corporation

The Botswana Development Corporation Limited (BDC) was established in 1970 to be the country's main financing agency for the establishment and development of commercially viable businesses. BDC products include equity participation, loan financing (short and long term), guarantees and provision of factory space. Its investment portfolio covers agribusiness, industry, property development and management, hotels and tourism, and financial services.

Due to corporate liquidations, total assets/liabilities of the BDC fell by 8 percent in 2009, with the fall in assets matched by a broadly equivalent decline in reserves.



BUILDING SOCIETIES

Botswana's only building society is the Botswana Building Society (BBS), which is tasked with raising funds to provide mortgage finance for both citizens and non-citizens. The society started operating in 1977, and has over the years steadily increased its market share, estimated at 30 percent of the overall property market and over 60 percent of the residential property market, the latter being its main focus. BBS has a wide range of savings and investment products in the form of shares and deposit accounts, and its nine branches cover most of Botswana's major urban and rural centres.

Promulgated in 1961, the Building Societies Act is being reviewed to bring it in line with present-day developments in the building society industry. This should help to remove some of the unnecessary rigidities in the current legislation and improve the BBS's competitiveness within the financial services industry by enabling the introduction of additional products and a wider range of financial services.

The balance sheet of the BBS increased by 7.8 percent during 2009 compared with 18.4 percent in the previous year. Loans and advances, of which mortgage loans comprise a substantial proportion, grew by 19.3 percent to P1.5 billion. However, cash and deposits at other banks contracted by 14 percent.

BUREAUX DE CHANGE & MICRO FINANCE

Bureaux de Change are entities licensed under Bank of Botswana Act (Cap 55:01) to carry on the business of buying and selling foreign currency, and operate in accordance the Bank of Botswana (Bureaux de Change) Regulations of 2004.

Trading activity by bureaux de change has been increasing rapidly, and at the end of 2008 assets totalled P22.9 million. By the end of 2009 there were 52 bureaux de change licensed to operate in Botswana.

The Non-Bank Financial Institutions Regulatory Authority (NBFIRA) is expected to provide supervisory and regulatory oversight for the operations of micro-lending businesses. Additionally, Micro-lending Regulations have been developed and the micro-finance industry is to be regulated under the Consumer Protection Act to shield borrowers from exploitation.

INSURANCE & PENSION FUNDS

Companies and individuals in Botswana enjoy a full range of every type of insurance. In 2009 there were 15 registered insurance companies in the country. In order to ensure the operational efficiency and effectiveness of the industry, the Insurance Industry Act was amended in 2003 to bring it in line with current industry operations and, in addition, penalties were raised in order to improve the effectiveness of the act.

The introduction of the International Insurance Act in 2005 is helping to create the necessary fiscal and regulatory environment to make Botswana an attractive location from which international insurance services, such as reinsurance, captive insurance and related activities, can be provided to non-citizens and in currencies other than the pula.

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Between 2004 and 2009, gross premiums written in the life insurance industry have increased by an average of 18 percent per annum.

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Botswana's pensions industry, along with other financial market development initiatives, provides an important opportunity for private sector involvement in the country's economic diversification objectives. The industry has expanded dramatically over the past few years, and assets of private pension funds in Botswana are now comparable to those of commercial banks.

The introduction of the defined contribution pension scheme for public officers was most significant for Botswana's capital market, with a total of P4.9 billion being transferred from government deposits at the Bank of Botswana to the Botswana Public Officers Pension Fund (BPOPF) in 2001.

The value of total pension fund assets has continued to grow. At the end of December 2009, total pension funds assets were P32.4 billion, representing an increase of 14.4 percent from P28.3 billion in the previous year. The major contributor to this growth was the value of domestic bonds and offshore equities, which rose by 47.2 percent and 26.3 percent respectively. This was, however, offset to some extent by a decrease of 25.6 percent in the value of offshore bonds.

The increased value of foreign equities reflected the substantial recovery in global equity markets since the end of 2008. The proportion of total assets that were invested offshore rose marginally, from 59.8 percent to 60.2 percent.

Because of the growth in the pension fund assets and the insurance industry, the Non-Bank Financial Institutions Regulatory Authority (NBFIRA) has decided to develop an appropriate regulatory and supervisory framework. Negotiations started in March 2009 between NBFIRA and the World Bank for the provision of technical expertise to enhance the regulatory framework for the insurance and pension sectors. The review of insurance and pensions legislation started in September 2009.

The review is necessary to inform the expected change in the basic regulatory mechanism from a compliance-based to a risk-based supervisory system. The risk based system is more dynamic and more relevant to today's financial environment. Both the revised Insurance Industry Act and the Pension and Provident Funds Act were scheduled to be tabled before parliament in 2010.

INTERNATIONAL FINANCIAL SERVICES CENTRE

The International Financial Services Centre (IFSC) was launched during 2000 in order to position Botswana as a hub for cross-border financial services and a regional gateway for capital and investment flows. The IFSC is regulated by the Non-Bank Financial Institutions Regulatory Authority (NBFIRA). Target sectors include funds management and administration; banking services; international insurance; holding and administration companies; business process outsourcing and call centres.

The main objectives of the Botswana IFSC are to: facilitate and promote the growth of a

cross-border financial services industry based in Botswana; help financial services and other companies obtain accreditation under the provisions of the Income Tax Amendment Act (1999) and the Income Tax Amendment Act (2006); encourage skills transfer in order to build the sophistication of Botswana's financial sector; promote international insurance activity under the provisions of the International Insurance Act (2005); promote investment funds under the provisions of the CIUs Act (1999); and encourage foreign direct investment.

The benefits of accreditation comprise:

- Reduction in tax income accruing to foreign operating subsidiaries
- Exemption from withholding taxes on interest, commercial royalties, management or consultancy fees and dividends paid to a non-resident
- No Capital Gains Tax
- Value Added Tax is zero-rated
- Access to Botswana's growing Double Taxation Treaty network
- A guaranteed corporate tax of 15 percent until 2020
- Access to Botswana's 200 percent tax training rebate

Changes to the Income Tax Act in 2006 significantly broadened the activities allowable in the Botswana IFSC. Company regulations were varied to allow for foreign currency denominated shares, a competitive offering aligned to international best practice. The announcement of further liberalisation of the telecommunications sector represents a potentially huge boost to IFSC business in enabling the adoption of leading technologies for cross border services and possibility of reduced tariffs.

Companies established under the IFSC employ a total of 585 workers, mainly in specialised professional level positions. With the availability of relevant and adequate skills in the domestic economy crucial for the continued success of the IFSC, the centre is to continue with its various initiatives, which include the Career Fair, Botsjobs, the Internship Programme and the Call Centre Stimulation Plan, all of which are aimed at building the skills base of the relevant IFSC business sectors.

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Currently, 45 companies are accredited under the Botswana IFSC, with a cumulative capital employed exceeding P6 billion. The total tax contribution by IFSC companies during 2009 stood at P87 million.

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The IFSC continues to promote Botswana as a regional and international financial services centre in order to contribute to sustainable economic diversification, employment creation, skills development and revenue generation. The centre is presently working with NBFIRA and the Bank of Botswana on streamlining licensing processes with a view to improving the turnaround time on new applications. A more efficient legislative framework will help to position Botswana as the medium to long-term preferred offshore financial services centre for Sub-Saharan Africa.

The Strategy for the Rationalisation of Public Enterprises, which is aimed at eliminating any overlaps in parastatal mandates giving rise to inefficiency and counter-productive duplication of efforts, has recommended that Botswana IFSC should be merged with Botswana Export Development and Investment Authority (BEDIA), as the two entities perform related activities of investment promotion and branding. The merger should achieve the following outcomes:

- The optimum utilisation of national resources and a reduction in public expenditure
- An effective and efficient service delivery system
- Value for money by refocusing the efforts of the two parastatals through the merger
- Improvement of policy coordination and enhanced shareholder oversight



To facilitate the merger, the BEDIA Act is to be amended to incorporate relevant laws enabling the IFSC, as well as to update the clauses relevant to BEDIA where necessary. The current Botswana IFSC dispensation will not be affected in any way by the merger.

Offshore investment banking

Certified by the IFSC in 2003, Kingdom Bank Africa Limited (KBAL) is the only offshore investment bank in Botswana, having been issued its offshore investment banking licence by the Bank of Botswana in August 2003. The bank was established as a wholly owned subsidiary of Harare-based Kingdom Bank Limited Zimbabwe (KBLZ), itself a subsidiary of Kingdom Financial Holdings Limited Zimbabwe (KFHLZ), which is listed on both the Zimbabwe and London stock exchanges.

The core activities of KBAL are treasury services, cross-border trade finance, corporate finance and trust and fiduciary services. The bank is committed to operating as a successful pan-African financial services group within the auspices of Botswana's IFSC by investing strategically in financial services companies in Africa that strive to be service providers of choice in their strategic markets.

From its Gaborone base, Kingdom Bank Africa Limited provides complete investment banking services to corporates, institutions and high net-worth individuals resident outside Botswana who wish to diversify their portfolios by taking advantage of the country's inherent economic strength and open monetary system.

BOTSWANA STOCK EXCHANGE

Originally known as the Botswana Share Market (BSM), the Botswana Stock Exchange (BSE) was established as a statutory body through an act of parliament. The exchange is pivotal to the country's financial system, in particular the capital market, as a means for government and the private sector to raise debt and equity capital. Presently there are three broking firms registered with the BSE, Capital Securities, Motswedi Securities and Stockbrokers Botswana.

The BSE has allowed dual listing with other stock exchanges since 1997. In 2001 the exchange launched a Venture Capital Board (VCB) that serves as a vehicle for newer businesses to raise start-up capital, but also signals higher investment risk. Furthermore, in order to be more responsive to global events, remain competitive and better serve its stakeholders, the BSE was established as an independent secretariat in April 2003. It is now a stand-alone unit that is fully independent from Ernst and Young Botswana.

The Botswana Stock Exchange Act is being reviewed to rationalise the regulatory structures governing the capital market and facilitate reforms on governance structures of the BSE. It is being replaced with a Securities Act, and the new legislation aims to:

- Provide for trading of all types of bonds on the BSE
- Modernise trading through the introduction of electronic clearing, settlements and record storage
- Streamline the governance of the exchange by defining the roles of different stakeholders
- Update the capital requirements for members of the exchange
- Introduce provisions to deter market manipulation and inside trading

Furthermore, a Central Securities Depository has been installed for electronic registration of share certificates.

Trading developments and company listings

Listed companies on the BSE represent a wide range of economic sectors, including banking, manufacturing, wholesale/retail, medical services, property, security services, mining, tourism and information technology.

During 2009, the Domestic Companies' Index (DCI) gained 206.4 points (or 2.9 percent), representing a partial recovery from the loss of 391.2 points (16.5 percent) in 2008. The impact of the global recession on the index was, however, limited; in part because all the listed mining companies are also dual-listed elsewhere and, as such, are part of the Foreign Companies Index (FCI). From late June 2009 the DCI began a steady recovery, reaching positive territory for the year in early November.

Trading was active in 2009, with 564 million shares valued at P852 million traded, and market capitalisation of domestic companies growing by 5.9 percent to P28.5 billion. As global economic activity showed signs of recovery, the FCI rose by 19 percent, compared to a fall of 45.8 percent in the previous year. No new companies were listed on the exchange during 2009.

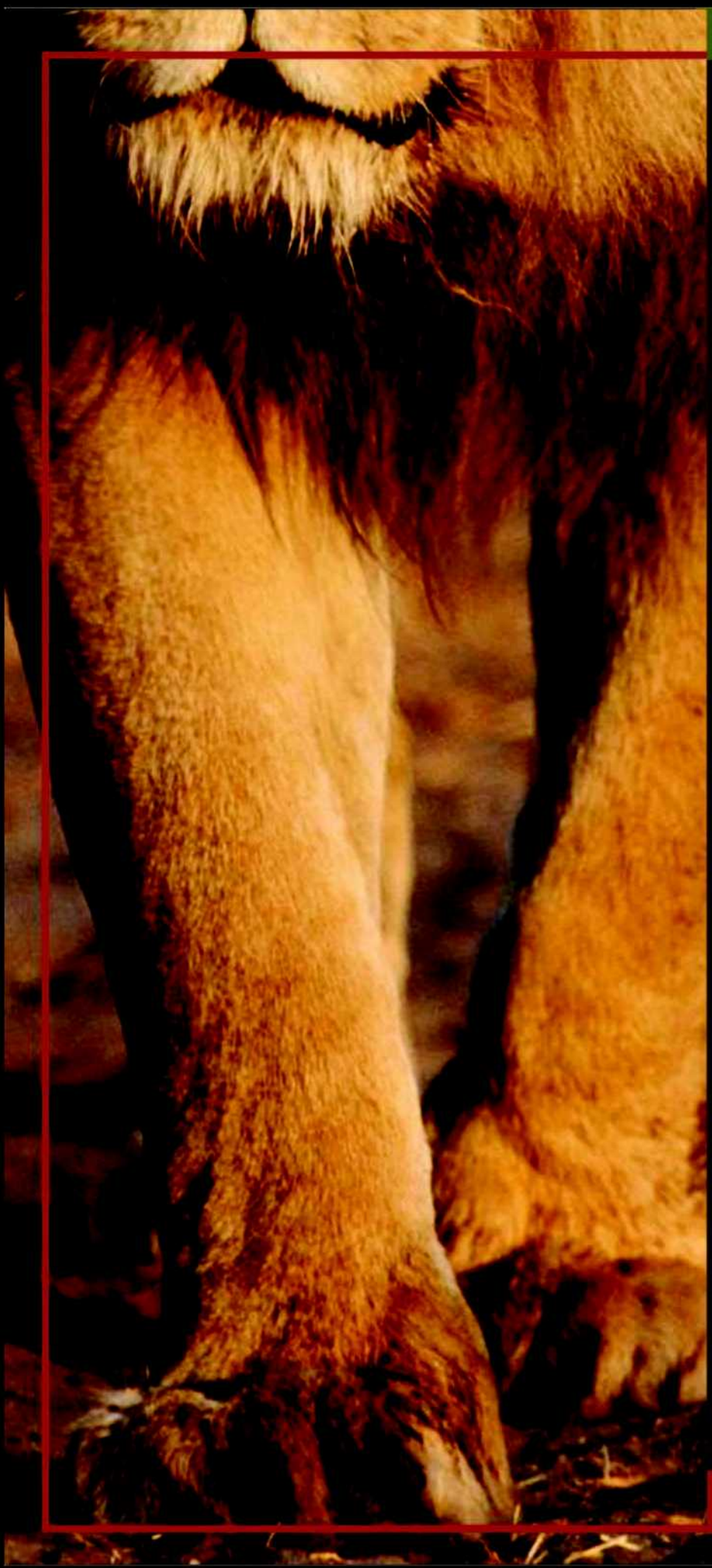
In July 2010 the BSE introduced Exchange Traded Funds (ETF), which are a preselected basket of shares structured in such a way that they trade as a single security. Introducing ETFs is one way of injecting liquidity into the BSE, which is currently very low because of a lack of instruments to draw out liquidity in the market. The first ETF to be listed is a Gold ETF in the form of the NewGold ETF, which is primarily listed on the JSE and dual listed on the BSE.

Currently, Botswana invests 60 to 70 percent of its savings, mainly pension funds, in international capital markets, due to lack of investment opportunities in the domestic market. There is, therefore, an opportunity to continue developing appropriate financial trading instruments in Botswana's capital markets in order to increase the amount invested locally.

Bond market

The first bond listing on the BSE was issued by the BDC in 1997 with a nominal value of P50 million. By 2001 there were three other listed bonds, all by parastatals, underlining government's intention to wean these entities gradually off government funding. In 2003, three government bonds were issued, with maturities of two, five and 12 years and a combined face value of P2.5 billion.

Another important development was the sale of the commercial portion of the Public Debt Service Fund (PDSF) loan book, which consisted of some P1 058 million worth of outstanding loans to parastatals, to the Debt Participation Capital Funding (DPCF), a special purpose investment company wholly owned by government. During 2004 the DPCF issued seven bonds worth P1 billion to the public, with maturities ranging from three to 21 years, thereby securitising



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Email: patience@firstre.co.bw,
auxlia@firstre.co.bw

the interest and principal owed by various parastatals to the PDSF.

In 2009, government continued the programme of supporting capital market development. To this end, a range of maturities continued to be issued through the Bond Issuance Programme that commenced in March 2008. These included P1 billion of six-month Treasury Bills and P300 million of bonds in March 2009, and P1 billion of six-month Treasury Bills and P500 million of bonds in September 2009.

As at December 2009, the total par value of the outstanding bonds and Treasury Bills was P4.1 billion. In terms of distribution, foreign investors held P60 million (1.5 percent) worth of government securities, while the BoB held P40 million (1 percent) worth of government securities for potential secondary market activity. The remaining 97.5 percent was held by commercial banks and their customers.

TAXATION & FISCAL LEGISLATION

A low taxation environment has been in place in Botswana for many years to encourage inward investment and expansion by local business. Corporate income tax is kept at 25 percent, while a special 15 percent rate is available for all companies operating within the jurisdiction of the Botswana IFSC. Other taxes include a value-added tax (VAT), a property tax and an inheritance tax.

Changes have been made in tax legislation in recent years in order to streamline and strengthen the system, increasing the disposable income of individual taxpayers, enhancing the country's competitiveness in attracting both direct and portfolio investment and intensifying anti-avoidance provisions.

Since the Income Tax Act was consolidated in 1995, the Act has been amended regularly in line with the development of the economy. Both the Income Tax Act and the Value Added Tax Act have recently been reviewed with the assistance of a consultant and the Taxation Review Committee.

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During 2010, while there were no major changes to the country's corporate tax laws, government announced it was to dispose of the two-tier system and replace it with a single corporate tax of 25 percent as from 1 July 2010.

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Tax administration and revenue collection

Sources of revenue such as VAT and income tax are playing an ever more important role in reducing government dependence on mineral revenues and replacing SACU revenues.

Enhancing the effectiveness and efficiency of tax administration is one of the most valuable methods of delivering the extra revenue needed, as more effective collection of existing taxes is seen as being a better approach than raising tax rates or introducing new taxes. As such, the Botswana Unified Revenue Service (BURS) was created to take over the functions performed by the Department of Customs and Excise and the Department of Taxes. A semi-autonomous agency, BURS became operational on 1 August 2004.

Value Added Tax

Sales Tax was replaced with Value Added Tax (VAT) in July 2002, and is applied at a uniform rate of 12 percent to a wide range of goods and services, which compares favourably with tax rates prevailing in the region. The advantage of VAT is that the system is fairer and more effective than Sales Tax, as well as being easier to manage. More importantly, VAT is stabilising and broadening the revenue base of the economy.

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WATER AND ENERGY

In the 2010/11 national budget, the Ministry of Minerals, Energy and Water Resources was allocated the highest share of the development budget - approximately P3.5 billion (28.7 percent). Five projects; namely, Morupule B Power Station at P1.4 billion, Water Planning and Development at P1.05 billion, Emergency Power at P610 million, Major Village Water Supply at P219 million and the North South Carrier at P250 million account for 99 percent of the ministry's budget. Village Water Supply, at P159 million, is covered under the Ministry of Local

Reasonably priced and readily available water, wastewater and energy services are essential elements in improving the competitiveness of Botswana's economy, while universal access to these utilities has the potential to unlock the country's ability to engage in productive economic activities, even at grassroots level.

WATER UTILITIES CORPORATION



Government.

WATER RESOURCES

Botswana's semi-arid climate and low rate of water resource replenishment makes the protection and conservation of this scarce resource crucial. The country's surface water, in particular, is very limited, with the highest concentrations in the north-western districts where the Okavango and Kwando (Chobe) rivers flow into the country. The total volume of surface runoff is low as well as being extremely variable in occurrence frequency.

The conservation and utilisation of water is hampered by factors such as periodic droughts and lack of suitable dam sites in the south-east near the main centres of demand, the better sites being in the more remote north-east. Developing water resources and infrastructure is therefore expensive, and groundwater reserves have in the past supplied most of Botswana's needs.

Water delivery infrastructure

The Ministry of Minerals, Energy and Water Resources formulates all policy decisions, which have traditionally been discharged through the Department of Water Affairs (DWA), the Department of Geological Survey (DGS) and the Water Utilities Corporation (WUC), with the Ministry of Local Government developing and upgrading water supply networks in secondary and tertiary rural centres.

In order to address the challenges associated with coordinating the provision of water supply services in the rural and major villages, it is planned that by 2013 the WUC will have taken over the water supply responsibility of some 543 villages that were originally supplied with water by the Department of Water Affairs and the Ministry of Local Government. Already, water supply at Tlokweng and Mogoditshane has been taken over by the corporation.

Water resource development and distribution is undertaken in line with the country's Vision 2016, which calls for a national strategy that will make water affordable and accessible to all. This entails conservation as well as the development of new infrastructure and sources of supply. Long term planning and development is guided by the National Water Master Plan (NWMP), with priority given to the development and usage of surface water ahead of groundwater, which is viewed as a strategic resource.

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At present, nearly 75 percent of the country's households have access to piped or tapped water.

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Government is presently working on the modalities of implementing the recommendations of the National Water Master Plan Review, with particular emphasis on the separation of water distribution from water planning and development. In this regard, a major restructuring of the water sector has been initiated, with the aim of reducing the number of water authorities in the country and transferring the remaining ones to the WUC. Among other recommendations, the review also recommends the construction of more dams to improve water supply resources countrywide.

Water Utilities Corporation

Incorporated through the Water Utilities Corporation Act of 1970, the Water Utilities Corporation (WUC) is a parastatal organisation mandated to provide water supply services to the urban areas of Botswana, and is involved in the complex operational process of treatment, pumping, storage and distribution to its consumers. During 2009, the WUC began to broaden its mandate through the assimilation of all council water unit resources, and will by 2013 have assumed responsibility for an additional 543 villages around the country.

The WUC presently supplies the potable water requirements of the urban centres of Gaborone, Francistown, Jwaneng, Lobatse, Selebi-Phikwe and Sowa, and more recently the villages of Tlokweng and Mogoditshane. The corporation's infrastructure includes six dams, namely Gaborone, Letsibogo, Nnywane, Bokaa, Shashe and Ntimbale, the North South Carrier (NSC) water scheme, and six water treatment plants.

Gaborone and Lobatse are supplied with water from Gaborone Dam, Nnywane Dam, Bokaa Dam and Molatedi Dam in South Africa, and the Letsibogo Dam via the NSC. Francistown and Selebi-Phikwe receive water from the Shashe Dam. Additional villages, including Serowe, Kanye and Molepolole, are to be connected to the NSC pipeline in National Development Plan 10 (NDP 10).

The NSC water scheme is the single biggest water transfer project undertaken in Botswana and one of the largest in the world. Developed to augment the rapidly growing demand from the country's main consumer areas in the east, water from the Letsibogo Dam in north-eastern Botswana is pumped south along a 360-kilometre transfer pipeline to augment supplies in the greater Gaborone area, as well as serving major villages located along the route.

The second phase of the NSC project, which involves the construction of Dikgatlhong and other dams, is aimed at securing reliable surface water supplies for urban, rural and industrial use in eastern Botswana up to 2035. The construction of the North-South Carrier II Pipeline Project was scheduled to start in 2010, and the pipeline and associated infrastructure should be in place by 2015.

Water conservation, quality and supply

Effective networks and partnerships are being developed between governmental and non-governmental organisations (NGOs), local authorities and other stakeholders to control increasing water demand and promote water conservation and protection initiatives nationwide.

In an effort to cut down on water losses, a number of strategies and initiatives have been put in place. These include network rehabilitation in all major villages, leakage detection, pressure monitoring and zoning of distribution networks. This has seen the development of a National Water Conservation Policy, its strategy and regulations.

Water is protected at source by delineating areas according to their vulnerability to pollution, and regular biological quality assessment of water sources and monitoring of the quality of water supplies at distribution, treatment plants and storage tanks is undertaken. The stringent water quality standards adopted by the WUC include those of the Botswana Bureau of Standards and the World Health Organisation.

However, at present, only 20 percent of supplied water in Botswana complies with the set quality standards, according to the Minister of Minerals, Energy and Water Resources. This is mainly due to the fact that

up to 65 percent of Batswana use groundwater resources, which are highly susceptible to pollution.

Government has prioritised the provision of potable water to all its citizens, and will during NDP 10 undertake projects directly linked to water quality challenges, such as the construction of treatment plants. Furthermore, additional villages will be connected to the North-South Carrier pipeline.

By 2016, households in most villages in the eastern corridor of the country will have access to treated water from surface water reservoirs. To cater for the southern part of the country, cross-border initiatives will be pursued with the South African authorities. Through these initiatives, Botswana should meet its target of 80 percent of water supplied being compliant with set water quality standards.

Sanitation and wastewater

In 2003 it was estimated that some 39 percent of Batswana had access to sanitation facilities. The plan is to increase this number to 55 percent during NDP 10. To achieve the target, government will undertake initiatives such as the Gaborone sewerage reticulation project, the upgrading of Gaborone treatment works, the Good Hope scheme and the Maun sanitation project.

To minimise effluent disposal into water courses, wastewater collection and utilisation projects have been earmarked for Maun, Palapye, Mahalapye, Serowe, Bobonong, Tonota, Shoshong and Good Hope. This is to be done in collaboration with the Ministry of Agriculture to fully utilise treated effluent in food production and to curb incidents of environmental pollution.

Surface and groundwater development

Surface water resources are developed in areas that are geographically and climatically suitable, while the investigation and expansion of regional groundwater reserves continues, with groundwater management projects and programmes including the collection and analysis of water level, rainfall and water quality data, as well as revision of water resource maps.

Three major dams are currently under construction to alleviate water shortages for households and industry. These comprise Dikgatlhong, Thune and Lotsane dams, with capacities of 400 million cubic metres, 90 million cubic metres and 40 million cubic metres, respectively.

The construction of Lotsane dam is expected to be completed in October 2011, while Dikgatlhong dam should be finished by February 2012. Tender evaluation for Thune dam was done in 2009 and construction is scheduled for completion in March 2013. In addition to supporting economic diversification by providing water for irrigation purposes, this project will see the combined volume of Botswana's dams rising from 393 to 967 million cubic metres, and the combined yield from 68 to 151.5 million cubic metres per annum.

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Surface water is reliant on shared rivers such as the Limpopo, Zambezi and Okavango. The benefits derived from these rivers are massive and the need to keep their ecosystems healthy is extremely important. To protect the Okavango River system and maintain its pristine status, the government has adopted the high-value low-volume tourism approach.

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International watercourses

In the long term, it is recognised that Botswana will rely increasingly on international water resources. As such, the country plays an active role in discussions relating to shared watercourses in the southern African region, and participates in the establishment of river commissions to regulate their use.

The International Waters Unit established by the Ministry of Minerals, Energy and Water Resources acts as secretariat for the international relations component of rivers and river basins. The unit operates closely with the DWA to protect Botswana's interests in the development and management of trans-boundary river resources at regional level.

The Okavango River Basin Water Commission (OkaCom) was established by Botswana, Angola and Namibia in 1994 to further collaboration and cooperation on the management of the Okavango river basin in an equitable, sustainable and efficient manner. Following a full environmental impact assessment, the integrated management plan should be completed early in NDP 10.

The Zambezi Watercourse Commission (ZamCom) was formed during 2004 to manage the sustainable utilisation of the Zambezi's water resources, and comprises eight co-basin states in the Southern African Development Community (SADC) region. The Zambezi is the largest shared river basin wholly in southern Africa, and could become a long-term source of supply for Botswana subsequent to the development of the Dikgatlhong Dam.

The Orange-Senqu River Commission (OraseCom) was established in 2000 under SADC's Protocol for Shared Watercourse Systems by Botswana, Lesotho, Namibia and South Africa. Resources from the Orange River system could benefit the remote southern parts of Botswana. Developments include the preparation of a water resource master plan for the whole basin.

Future plans include the abstraction of water from the Zambezi River to supply the Zambezi integrated agro-commercial project at Pandamatenga, as well as from the Lesotho Water Highlands Scheme to supply the south-western part of the country. Negotiations with Zambia and Lesotho are ongoing.

Rural water supply

Most of the water supplied in rural areas is derived from groundwater, and covers domestic, industrial, commercial and institutional demands. The DWA has been responsible for the design, construction and operation of water supply systems in the major villages in order to provide adequate and potable supplies. This responsibility now being handed over to the WUC to bring all of Botswana's water supply schemes under one authority. The most comprehensive scheme currently underway

is the Major Villages Water Supply and Development programme, with P219 million allocated in the 2010/11 budget.

An emergency programme was jointly implemented in 2009 by the Ministry of Minerals, Energy and Water Resources and the Ministry of Local Government to address the problem of village water shortages. Some 79 villages were targeted by the programme, which involved construction of treatment plants and water pipelines, equipping of boreholes and installation of pumps.

The Village Networks Project Rehabilitation, which will ensure that water losses are minimised and more plots and customers connected in the major villages, has begun.

ENERGY SUPPLY

As energy constitutes a significant input cost in various productive sectors of the economy, an efficient, reliable and reasonably priced supply of energy enhances the competitiveness of local enterprises. Government also continues to explore ways of increasing the use of renewable energy to diversify energy sources and consequently improve supply security.

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Access to electricity in Botswana stands at 56 percent of the population and is targeted to reach 80 percent by 2016.

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Energy policy and legislation

Since the formulation of the Botswana Energy Master Plan in 1985 and its subsequent review in 1996, the energy sector has been faced with many challenges, both locally and globally. The review of the Botswana Energy Master Plan and the development of the draft National Energy Policy have been undertaken to help manage these challenges and provide direction for the future development of the sector.

Botswana's limited energy resources have led to a reliance on imports, especially petroleum products and electricity. In recent years, energy shortages have been experienced locally as well as across the southern African region as a result of faster than anticipated growth in demand coupled with inadequate generation investments over the years. This resulted in tight supply-demand margins, where demand outstripped supply from time to time, especially during the morning and evening peak load times.

As a result, government is focusing on implementing new power generation projects while identifying diversified electricity sources in order to improve the security of energy supply in the country. While a number of short-term measures have been instituted to improve the situation, the Botswana Power Corporation (BPC) has announced that the electricity supply-demand balance will remain tight up to the end of 2012 and the commissioning of Morupule B Power Station.

Since the amendment of the Electricity Supply Act to allow independent producers to set up power stations, there has been increased interest from private investors in power generation. In further efforts to improve the environment for private sector participation, government is to establish an Energy and Water Regulator, whose role will be to review electricity and water tariffs as well as issue licenses to independent power producers.

In order to reduce connection costs and improve electricity uptake, in 2009 government introduced the National Electricity Connection Standard Cost (NECSC) of P5 000 in both rural and urban areas. To help implement this initiative, a National Electrification Fund (NEF) will be established during the 2010/11 financial year. From April 2010, a levy of 5 thebe per kilowatt hour is being charged on monthly electricity consumption by every consumer to sustain the fund.

Botswana Power Corporation

A parastatal under the Ministry of Minerals, Energy and Water Resources, the Botswana Power Corporation (BPC) generates, transmits and distributes electricity in Botswana for domestic, commercial and industrial use, with the mining industry its largest consumer.

BPC currently supplies about 20 percent (120 MW) of the country's electricity needs through the coal-fired Morupule Power Station, Botswana's main domestic source of electrical energy generation, with the remainder having to be imported. Morupule has been run as a base load station since 1998.

In preparation for the restructuring of the electricity supply industry in Botswana, BPC is focusing on improving operational efficiency. Demand Side Management Programmes have been implemented to promote the mindful use of electricity with the intention of ensuring sustainable economic growth up to the commissioning of Morupule B. Initiatives have concentrated on managing demand loads, shifting demand to off-peak periods and educating the nation about energy conservation through the National Electricity Efficiency Campaign.

New power generation projects

Expansion of the coal-fired Morupule Power Station has begun as a medium-term solution to the power shortage problem. Phase 1 of Morupule B will produce 600 MW, and is expected to be commissioned in December 2012.

Following the identification of a massive coal resource at Mmamabula, CIC Energy is looking to develop a mine and export power station under the Mmamabula Energy Project. Aviva Corporation's Mmamantswe coal project is also under consideration, with an estimated 1.3 billion tonnes of coal reserves in the Mmamantswe area capable of fuelling a 2 000 MW power station for 40 years. Both the Mmamantswe and Mmamabula projects are currently on hold.

During 2010, government developed a 70 MW emergency power supply in Matshelagabedi and a 90 MW emergency power supply in Orapa. In addition to coal-fired power stations, the possibility of developing a 200 MW Solar Thermal Power Station is being explored, with private sector involvement encouraged.

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Botswana is aiming to achieve 100 percent self-sufficiency in electricity generation by the end of the NDP 10 plan period.

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Energy sources

Botswana's energy sources comprise the following:

- Fuelwood - While 93 percent of domestically generated electricity is provided by coal, fuelwood is still used by 90 percent

of the rural and 60 percent of theurban population. Around half of the final energy demand in Botswana is met by fuelwood, which is used mainly for cooking and heating. The Biomass Energy Strategy (BEST) for Botswana being developed with the assistance of the Deutsche Gesellschaft fur Technische Zusammernarbeit (GTZ) will build awareness of biomass energy as the main source of primary energy and its relevance to poverty alleviation.

- *Coal* - Botswana's extensive coal reserves, estimated at about 212 billion tonnes, are used to generate electricity at the coal-fired Morupule Power Station, which is currently being expanded. The use of coal is promoted, and the newly constructed coal beneficiation plant at Morupule provides an improved quality product that is more suitable for household use. With the export of coal proving difficult, alternative uses for the country's vast resources are being considered, such as generating power for export from coalfields at Mmamabula and Mmamantswe.
- *Solar energy* - Solar energy applications are promising in a country such as Botswana, which has long hours of sunshine, and solar power is thus promoted as a clean source of energy that is able to complement grid electricity and improve access to energy, particularly in rural areas. Photovoltaic (PV) rural electrification activities began in the early 1980s and current initiatives are sponsored by the United Nations Development Programme (UNDP) through the Global Environment Facility (GEF).
- *Coal-bed methane* - The results of the coal bed methane gas study suggest that Botswana's coal beds contain an estimated in-situ gas of 60 trillion cubic feet, with prospects for commercial viability for 15 to 20 percent of the deposits. A number of companies are conducting advanced coal and coal-bed methane (CBM) exploration.
- *Petroleum* - Botswana imports nearly all its refined petroleum products from South Africa. Petroleum is used mainly in the transport sector, with diesel fuel also providing energy for generators, and paraffin used in some households for cooking and lighting. With Botswana's economy dependent on mining and other fuel intensive activities, security of supply is vital. A facility is being built in Palapye to house government strategic stocks of petroleum, in case of regional or international supply emergencies.
- *Biofuels* - A feasibility study has been conducted on the possibility of producing and using bio-fuels in Botswana. This investigation revealed potential in bio-ethanol and bio-diesel. During NDP 10, government will engage in projects geared towards the production and the use of these biofuels, and intends to install a biodiesel processing plant with a capacity of 50 million litres by 2016.

The Department of Energy Affairs is also in the process of demonstrating the use of biogas at Mabesekwa for cooking and electricity generation. Biogas production was first established in Botswana around 1976 by the Rural Industries Innovation Centre (RIIC) in Kanye. Currently there are five biogas plants in the country, both at commercial and household levels.

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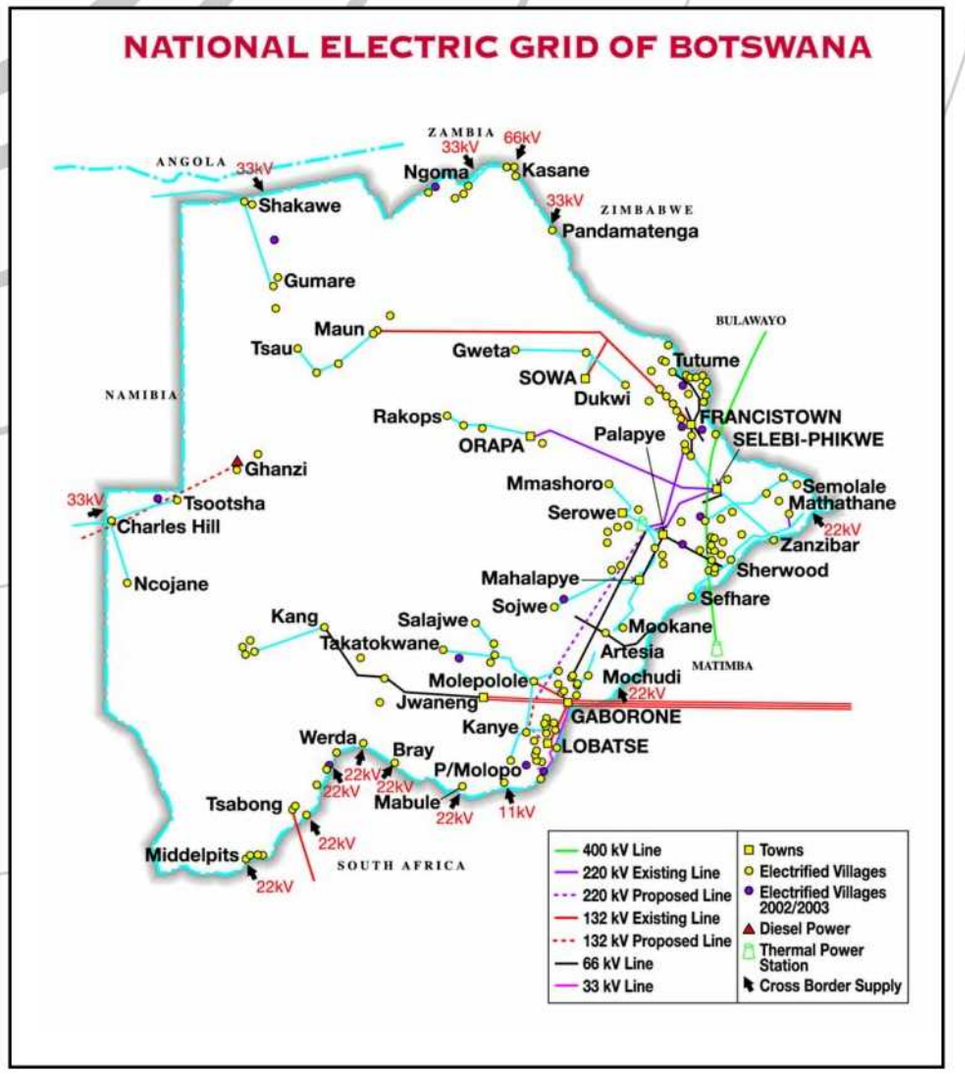
Botswana is heavily reliant on thermal power, and is striving to acquire appropriate technology to exploit its coal resources with minimal carbon emissions.

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Energy efficiency

Energy saving is receiving more attention, and various activities have been implemented to bridge the gap between demand for and supply of electricity. These include energy saving campaigns and the use of more energy efficient lamps. For medium to long-term power supply solutions, government intends to invest in photovoltaic power generation, bio-diesel production and installation of solar energy systems for lighting in rural villages.

The Botswana Power Corporation's Power Management Programme (PMP) promoted use of Compact Fluorescent Lamps (CFL) and domestic water heating control.



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Reducing energy consumption in the industrial sector has also been implemented through energy audits and taking appropriate measures based on that audit.

Energy efficiency is also given due consideration in new building regulations. The Energy Affairs Division has worked with Buildings Regulation Board to develop energy efficiency regulations for buildings with an area greater than 500 square metres.

Southern African Power Pool

The Botswana Power Corporation is an active member of the Southern African Power Pool (SAPP), and participates in the region's energy trading transactions. Some 80 percent of Botswana's electrical energy requirements are met through imports, coming from Eskom in South Africa (70 percent) as well as providers such as Mozambique's Hidroelectrica De Cahora Bassa and Electricidade de Mocambique (EDM).

A new five-year Power Supply Agreement with Eskom came into effect on 1 January 2008, under which BPC had access to 350 MW during 2008 and 2009. This was reduced to 250 MW in 2010 and further to 150 MW in 2011 and 2012. Load shedding by Eskom is shared proportionally between Eskom's domestic customers and Botswana.

To supplement reduced imports from South Africa, a three-year 50 MW supply agreement with the Democratic Republic of Congo's SNEL became effective in 2010. Furthermore, an annual supply arrangement was concluded with EDM of Mozambique and NamPower of Namibia for the provision of up to 100 MW on a non-firm basis, subject to the availability of surplus in the respective power systems. Other attempts to augment the country's energy supply include a deal with Zimbabwe to rehabilitate the power supply plant in Bulawayo, which will result in an additional 40 MW.

Rural electrification

Government continues to pursue the electrification of rural areas, given its potential to improve the economic and social lives of Batswana. The ongoing Rural Electrification Programme is funded by the Botswana government and managed by the Botswana Power Corporation. This project is connecting previously un-electrified villages to national or cross-border power grids as well as developing secondary reticulation within the villages themselves.

In order to improve access to energy services in rural areas while promoting the use of renewable energy, and in view of the policy objective to offer customers a choice between photovoltaic (PV) and grid electricity, over 6 000 households are targeted to receive solar electrification over a period of five years. The Botswana government is co-funding the Renewable Energy Based Rural Electrification programme - known as the RE Botswana project - with the Global Environment Facility (GEF) through the UN Development Programme (UNDP).

HEALTHCARE

To realise the goals of economic diversification, private sector development and competitiveness, the nation's human resource must be healthy. It is for this reason that government continues to provide health services at subsidised rates to ensure health for all, and enhance productivity at the workplace for both the public and the private sectors.

There have been remarkable improvements in healthcare services since Botswana gained her independence. Between 1966 and 2002 the number of health centres increased from about 100 to 1 426, while improvements in infrastructure and social services saw life expectancy at birth rising from

Improved productivity and a transformed economy are only possible if the workforce is drawn from a healthy population. In recognition of this fact, the Botswana government remains committed to developing and improving health services.

THE NEW STATE-OF-THE-ART SEKGOMA MEMORIAL HOSPITAL IN SEROWE



46 years in 1966 to 65.3 years in 1991. At the same time, the infant mortality rate fell from 108 per 1 000 live births in 1966 to 48 per 1 000 live births in 1991.

However, while significant strides have been made in improving access to health services, the scourge of HIV/AIDS has subsequently compromised the healthcare system and eroded a number of these advances. In addition to exacerbating poverty, the epidemic has also reduced labour productivity and supply, putting further constraints on sustained economic growth.

Botswana has also begun grappling growing rates of so-called 'diseases of civilisation'; conditions that are often linked to a rapid transition from traditional ways of life to more sedentary lifestyles, reliance on processed foods, urban residence, etc. The rise in rates of non-communicable diseases, notably hypertension, diabetes and cancer, are cause for concern. This, together with the emergence of HIV-related conditions such as tuberculosis (TB), has put a huge strain on Botswana's infrastructure.

Developments during 2010

Responsibility for Primary Health Care is being transferred from the Ministry of Local Government to the Ministry of Health in order to harmonise and strengthen the coordination of health service delivery by bringing it under one authority. It is expected that this will help to improve efficiency and service standards, promote equity and access to specialised services, and enhance effectiveness and quality in the provision of healthcare. Moreover, it is seen as a step towards establishing a comprehensive, well coordinated and sustainable healthcare delivery system that will result in optimum utilisation of scarce resources.

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The Ministry of Health is in the process of taking over responsibility for Primary Health Care in order to help establish a comprehensive, well coordinated and sustainable healthcare delivery system.

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A study to identify long-term financing options for the response to HIV and AIDS has been commissioned, with the results expected to assist in the required transformation of the national response and financing from 2010 and beyond. In addition, a partnership framework with the US government is being developed, which should help to channel all support from Botswana's various development partners to priority areas and ensure long-term sustainability.

Furthermore, government has started outsourcing some HIV/AIDS interventions through increased engagement of the private sector and civil society organisations. Through the Botswana National HIV and AIDS Prevention Support Project, launched in July 2009, the capacity of civil society organisations will be augmented to deliver and scale up prevention interventions, initially under Phase I districts; namely, Kweneng East, Goodhope, South East, Selebi-Phikwe and Francistown during 2010/11 and 2011/12. Phase II will cover the whole country, based on experience gained from implementing Phase I.

Other current developments in health policy and legislation include a review of the National Population Policy to focus on improving the standard of living of the population by dealing with the challenges of ill health, poverty and HIV/AIDS, as well as non-demographic variables such as improved access to social services and employment creation. The Botswana National Health Policy of 1995 is being reviewed and an Integrated National Health Service Plan developed to serve as a guide with respect to the types of services and resources (financial, structural, and human) that are required to improve the provision of health services in the country. The new Public Health Act contains the legislative provisions to facilitate organ transplant.

Furthermore, the drafting, revision and review of a number of other pieces of health-related legislation is being undertaken; including the Drugs and Related Substances Act, the National Policy on Care for People with Disabilities, the National Policy on Mental Health, the National School Health Policy, the National Policy on Blood Transfusion, the National Medical Labora-tory Policy and the Human Health Research Bill. The latter, in particular, is being drafted to ensure that such research is scientifically and ethically sound.

THE HIV/AIDS EPIDEMIC

In order to control the spread of HIV/AIDS, government policy focuses on providing care and support for those infected and mitigating the pandemic's public health, social and economic impact. Initiatives implemented include the anti-retroviral (ARV) treatment programme, prevention of mother-to-child transmission of HIV/AIDS (PMTCT) programme, routine testing in hospitals, voluntary counselling and testing, research, early detection, new treatment therapies and vaccine trials, blood safety programmes, sexually transmitted infection (STI) management and TB treatment.

There has been notable progress in combating the epidemic, with HIV prevalence rates, both at the national level and for most age groups, having dropped. According to UNAIDS, HIV prevalence among Batswana aged 15-49 years was estimated to be 23.9 percent in 2007, down from 26.5 percent in 2001. By these estimates, in 2007 approximately 300 000 individuals were living with HIV/AIDS in Botswana. It is also estimated that approximately 95 000 AIDS orphans (children having lost one or both parents to HIV-related death) were living in the country.

Infection rates also seem to have dropped for the younger generation, according to the results of the third Botswana AIDS Impact Survey (BAIS III). The 2008 survey indicated that the prevalence rate for those aged 15 to 24 years had reduced from 15 percent in 2004 to 8 percent in 2008.

There has also been considerable progress in making anti-retroviral therapy (ART) available to those who need it. UNAIDS estimates that as of 2007, out of 120 000 infected individuals requiring treatment in Botswana, 93 000 were receiving ARTs. This constitutes 79 percent ART coverage, up from 44 percent just three years earlier (2004). In addition to help from donor initiatives, in 2009/10 the government spent P800 million on ART provision.

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One of the major achievements in the fight against the pandemic has been the completion and approval of the second

MINISTRY OF HEALTH
HEALTH HUB

REPUBLIC OF BOTSWANA

BOTSWANA HEALTH HUB
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OBJECTIVES

- To identify ways in which the delivery of high quality health services can contribute to economic diversification and employment creation
- To establish clinical and research centres of excellence in Botswana that can service SADC and international clients
- To stimulate focused initiatives that have a direct impact on the efficiency and quality of public healthcare in Botswana

DEFINING THE HEALTH HUB

It is important to provide a clear definition of the Health Hub to avoid confusion and misconceptions relating to its role and focus within the Ministry of Health

HEALTH HUB DEFINITION: A focused function within the MOH that identifies strategic initiatives and innovation to drive sustainable transformation and service delivery improvement throughout the Botswana health sector.

The Health Hub therefore has a clearly defined mandate to support service improvement in the health sector by supporting the Ministry of Health through the use of research and innovation and at times greater private and non-governmental collaboration.

WHAT THE HEALTH HUB IS:

- *A catalyst to stimulate focused and strategic health sector initiatives*
- *A sounding board for problem solving ways to deliver MOH strategic objectives*
- *A mechanism for resolving inter-governmental bottlenecks and exchanging information*
- *A way to facilitate multi-stakeholder participation*
- *A medium to actively engage the private and development sectors at a strategic level*

STRATEGY FOCUS FOR INVESTMENT IN THE HEALTH SECTOR

In order to promote diversification and employment creation, the Government of Botswana in 2008 created a unique combination of sector clusters called Hubs. Among these is the Health Hub, which is a focused function within the Ministry of Health that identifies strategic initiatives and innovations to drive sustainable transformation and service delivery improvement throughout the sector.

The functional principles of the Health Hub are:

- Ensure efficiency in service delivery and offer quality services
- Enhance service delivery through strategic partnerships (PPP) and outsourcing selected services
- Establishing clinical and research centres of excellence that can service both the region and international clients
- Promote "Medical Tourism" to cater for local, regional and international health care needs

VISION

DRIVING INNOVATION TO ENHANCE SERVICE DELIVERY THAT FACILILATES ECONOMIC GROWTH WITHIN THE BOTSWANA HEALTH SECTOR

MISSION

TO IDENTIFY SPECIFIC INITIATIVES THAT WILL ENABLE BOTSWANA TO TRASFORM DELIVERY AND BECOME A REGIONAL CENTRE OF EXCELLENCE BY STIMULATING MULTI-STAKEHOLDER PARTICIPATION

AREAS OF INVESTMENT

- Centre of excellence for cancer treatment
- High quality facility for orthopaedic services
- Modern treatment facilities including surgery for cardio-vascular diseases
- Organ transplant services
- Neurological treatment facilities
- Pharmaceutical industry
- High quality diagnostic facilities (imaging and laboratory)

There are other areas of opportunity in this sector

WHY INVEST IN BOTSWANA?

- Government may consider tax-holiday for investment in priority areas
- Can repatriate profits from investments
- Contracting service delivery packages to hospitals and clinics and for diagnostic services
- Possibility for PPP with leasing out existing health facilities
- Joint venture with Government Subsidiaries such as Botswana Development Corporation

Botswana National Strategic Framework for HIV/AIDS (NSF II) 2010-2016 in December 2009, with the theme of 'Making Prevention Work for Botswana'. Aligned to the country's Vision 2016 and National Development Plan 10, NSF II will serve as the country's road map for all stakeholders.

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Donor initiatives

While government's response to the pandemic has focused mainly on treatment and care, including programmes for vulnerable groups such as orphans, donors have concentrated on human resource and programme development.

The most significant initiatives supported by foreign donors are the African Comprehensive HIV/AIDS Partnerships (ACHAP) and the BOTUSA project. Established in July 2000, ACHAP is a unique public-private partnership (PPP) between the Botswana government, the Bill & Melinda Gates Foundation and the Merck Company Foundation dedicated to supporting the country's response to HIV/AIDS.

ACHAP is a key partner in the Masa programme, providing extensive financial and technical assistance in the provision of free anti-retroviral drugs (ARVs). The Bill and Melinda Gates Foundation and the Merck Company Foundation have each committed US $50 million towards the project, and Merck is also supplying two of its antiretroviral medicines free of charge for the duration of the partnership. Other ACHAP-supported projects include the HIV/AIDS Resource Centre in Serowe and the House of Hope in Palapye for orphaned children.

In 1995 the US Centres for Disease Control and Prevention (CDC) and the Botswana government began a collaboration called BOTUSA, to work on public health research and programmes to combat TB as well as HIV/AIDS. Clinical trials supported by BOTUSA allowed the strengthening of Botswana's ability to both track and prevent the spread of tuberculosis.

BOTUSA has grown substantially since 2000, and is now part of the President's Emergency Plan for AIDS Relief (PEPFAR), which began with an initial five-year US $15 billion US government plan to combat HIV/AIDS in more than 120 countries throughout the world. Botswana is one of PEPFAR's 15 focus countries, and has received over US $100 million since 2003 to scale-up successful programmes and launch new HIV/AIDS prevention, care and treatment activities nationwide.

A new five-year PEPFAR partnership framework was signed in August 2010 to ensure that PEPFAR programmes continue to be an integral part of the HIV/AIDS response in Botswana. Under the leadership of NACA and the Ministry of Health, the strategic plan will focus on technical support and long-term sustainability of health programmes.

Boehringer-Ingelheim's partnership with government has provided for the training of personnel engaged in the war on AIDS. In addition, during 2004 the Global Fund to Fight HIV/AIDS, Tuberculosis and Malaria started implementation of its activities in Botswana under a grant agreement worth some US $18.6 million to cover assistance to NGOs and CBOs, and the rollout of the PMTCT Programme.

Assistance from these and other partners, such as the Harvard School of Public Health, Bristol-Myers Squibb Foundation and a variety of faith and community-based organisations, is enabling Botswana to produce one of the continent's most comprehensive programmes of HIV/AIDS prevention, treatment and care.

The Botswana Network of AIDS Service Organisations (BONASO) coordinates the activities of various organisations operating in the sector to ensure efficient utilisation of resources, helping to develop institutional capacity of its members and serving as a mouthpiece for all NGOs and CBOs dealing with HIV-related work.

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The Botswana Network on Ethics, Law and HIV/AIDS (BONELA) has been instrumental in ensuring that the response to HIV/AIDS in Botswana is aligned with human rights approaches.

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HIV/AIDS PROGRAMMES

The National AIDS Coordinating Agency (NACA), which falls under the Ministry of the State President, was established in 2000. Under NACA's National Strategic Framework there has been greater focus on preventing new infections through advocacy, condom distribution, behavioural change interventions, education and communication strategies, and special emphasis on vulnerable populations such as pregnant women and youth.

The second Botswana National Strategic Framework for HIV/AIDS (NSF II) 2010-2016 was approved in December 2009. Aligned to the country's Vision 2016 and National Development Plan 10, NSF II serves as the country's road map for all HIV/AIDS initiatives.

Current challenges for HIV programmes include a high level of awareness that is not converted into behaviour change, particularly as many Batswana still do not know their HIV status. Other obstacles hinge on social and cultural factors that influence risky behaviour and hinder safe sex practices and early health seeking behaviour.

Voluntary and routine testing

Testing for the HIV virus is a crucial entry point for prevention, treatment, care and support. With the help of BOTUSA, the Ministry of Health has established a network of Tebelopele centres providing immediate and confidential Voluntary Counselling and Testing (VCT) services for sexually active Batswana aged 18-49.

The Tebelopele centres have been supported by the 'Know Your Status' and 'Show You Care' campaigns, which have been marketed through billboards, bus stops, banners, print advertisements and regular radio programmes throughout Botswana. Tebelopele became an independent NGO in 2004.

The routine HIV testing strategy implemented in 2004 has been rolled out to all of Botswana's public healthcare facilities, and thus provides greater coverage than VCT. The acceptance of routine HIV testing continues to increase. Current estimates indicate that over half (53 percent) of Botswana's population know their HIV status, compared to 25.4 percent in 2004.

An emerging trend is the significant increase in the number of first time testers



Facts about The African Comprehensive HIV/AIDS Partnerships (ACHAP)

1. Established in 2000, ACHAP is a country-led, public-private development partnership between the Government of Botswana, The Bill & Melinda Gates Foundation, The Merck Company Foundation/Merck &Co., Inc dedicated to supporting and enhancing Botswana's national HIV/AIDS response.

2. Through the period 2001 - 2009, the Bill and Melinda Gates Foundation and the Merck Company Foundation together contributed US$106.5 million to the initiative. In addition, Merck donates the antiretroviral (ARV) medicines STOCRIN, CRIXIVAN, ATRIPLA and ISENTRESS to Botswana's national ARV programme - known as Masa (or "new dawn").

3. ACHAP's goal is to reduce HIV incidence and minimize the impact of HIV/AIDS and TB in Botswana through integrated and focused approaches to the HIV/AIDS response in Botswana. During its first phase, ACHAP interventions focused on:

i) Prevention of HIV infection including condom procurement and distribution, behaviour change communications focusing on youth and other vulnerable populations; blood safety; STI prevention and treatment

ii) Expansion of HIV counseling and testing including support for routine (provider initiated) HIV testing, procurement of HIV rapid test kits and strengthening of post-test services.

iii) Continued support of the national ARV treatment programme and Support for advocacy community mobilization and empowerment of people living with HIV/AIDS and their communities, to enhance program implementation.

4. ACHAP programmes are developed in consultation with the Government of Botswana, civil society, development partners and the private sector, by facilitating the development and implementation of strategic initiatives through provision of human, technical and financial resources.

Key achievements include support for:

i) The development of the National Strategic Framework on HIV/AIDS 2003-2009 and 2nd National Strategic Framework (2010 -2016) to guide implementation of HIV/AIDS strategies and the national HIV response monitoring and evaluation framework.

ii) The establishment and roll out of the Masa ARV programme; one of the largest treatment programmes in Africa. ACHAP provided support for infrastructure, human resources and training of over 7000 health care workers through the KITSO and Preceptorship training programs. The Botswana National ARV Program currently is processing reports from 32 ART sites and 154 satellite clinics monthly throughout the country. There are currently a total of 145,413 patients currently receiving HAART in Botswana which amounts to 89.9 % of the projected 161,700 adults and children in need of ART for the year 2009/10. Of these 132,019 receive treatment with public sector support while 13,394 are receiving treatment initiated by the private sector. The treatment adherence rate is close to 90%. ACHAP also Provided the ARV program with CD4 cell count, viral load and other equipment to health facilities to support the development of referral and district hospital patient monitoring capacity.

iii) Condom procurement, distribution and education at national and district level.

iv) Policy initiatives to introduce Routine HIV/AIDS Testing wherein patients are offered HIV testing on an "opt-out" basis - a now widely replicated practice.

v) To local media to mainstream HIV/AIDS in their editorial policies and to develop HIV/AIDS Workplace policies for their employees.

vi) The development of a "National Operational Plan for Scaling Up HIV Prevention in Botswana: 2008-2010" to guide the national response in scaling up prevention interventions

vii) The development of a sustainable capacity for the treatment and TB programmes through a human resource recruitment model that enables retention of long term retention.

viii) The development and implementation of the national multi-sectoral HIV response monitoring and reporting system.

Current and future priorities for ACHAP include supporting government to scale up HIV prevention efforts focusing on young people including support for safe male circumcision; continued support of the ARV program, support for TB/HIV service integration and further strengthening knowledge generation and management for programme development.

aged 50 years and above. There are still substantially more women than men testing, and alternative methods of targeting men to test and know their HIV status are being explored.

The Masa Programme

The MASA Programme was launched in January 2002 with the support of ACHAP, and the ARV programme has subsequently been rolled out to 128 satellite clinics countrywide. By end of June 2008, 85 541 patients were on treatment in the public sector, of which 61 percent were females. About 8 percent of the patients were children, while 13 percent were above 50 years of age.

Some 68 percent of these public sector patients received treatment at hospitals, while the remaining 31 percent were on treatment at satellite clinics. A further 10 054 patients had been outsourced from the public sector to the private sector, with another 9 514 being treated in the private sector though medical aid schemes and workplace programmes.

Botswana's ARV uptake is the highest in Africa. By 2009, a total of 105 109 patients were receiving anti-retroviral therapy (ART) in Botswana out of an estimated target population of 110 000 by 2009. By 2010, this had risen to around 120 000 patients on ARVs, out of which just over 7 000 were children.

Prevention of Mother-To-Child Transmission of HIV/AIDS

Botswana has one of the best prevention of mother-to-child transmission of HIV/AIDS (PMTCT) programmes in Africa. This has involved the provision of free zidovudine, also known as AZT, to HIV-infected expectant mothers since April 1999 in order to prioritise the prevention of peri-natal HIV infections.

It is estimated that without intervention between 25 and 40 percent of HIV positive mothers risk infecting their babies during pregnancy and the peri-natal period. At present, 96 percent of babies born under the programme are HIV-negative. Such infection rates approximate those of developed countries, where vertical HIV transmission has been virtually eliminated.

All pregnant women attending a health facility are now routinely offered an HIV test unless they decline. Those found to be HIV-positive receive immediate counselling and are put on a long course of AZT at 28 weeks, and given a single dose of nevirapine during labour. The infant is given four weeks of AZT and a single dose of nevirapine.

The programme has shown consistent improvement in coverage and uptake, which is estimated as the highest in Sub-Saharan Africa. Of those eligible for ARV treatment, 89 percent were enrolled in the programme by 2010.

Attention is also being given to employing new HIV testing technologies to gather more information on the rate of new infections in both adults and children. Under PMTCT, the Early Infant Diagnosis programme uses a Polymerase Chain Reaction (PCR) test to detect small quantities of viral protein in the blood. This testing regimen allows diagnosis of infants' HIV status early, at six weeks of life. Previous testing methods permitted infant diagnosis only at 18 months.

With an increasing number of HIV-infected women enrolling, the link with the ARV Programme is being strengthened to extend access to their children and spouses as well. The multimedia male involvement campaign and partner HIV testing is being undertaken nationally to mobilise men to test with their partners and to support them. Preliminary results indicate that more males are coming with their partners to test, and this trend needs to be encouraged.

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Community based home care (CBHC) complements the healthcare system by providing home-based care to people with HIV/AIDS and other chronic diseases. The outcome of providing ARVs nationwide can be seen in the steep reduction in the number of home-based care patients since 2003.

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Sexually transmitted infections

Sexually transmitted infections (STIs) play a significant role in HIV transmission and their prevention and control is an integral part of HIV management. The STI Programme adopted the syndromic approach to STI management as early as 1992, which has made it possible to provide integrated STI services in all healthcare facilities, including clinics.

Educational material targeted at population subgroups in the behaviour change continuum has also been developed, while mass media is used in promoting attitudinal change and popularising safe behaviour. This includes promoting condoms to ensure frequent and consistent use, with both male and female condoms being supplied free of charge from Central Medical Stores.

Drugs continue to be provided free of charge to infected patients. While bacterial STIs have been reduced, there is still a high prevalence of viral STIs. Integrating Safe Male Circumcision as an additional strategy for HIV prevention is being considered.

Orphan care

A situational analysis on orphans and vulnerable children (OVCs) has been carried out, as well as an evaluation of the Short Term Plan of Action (STPA). The findings and recommendations from these two studies will inform the development of a long term comprehensive national policy on OVCs. Funding for these initiatives has been sourced from PEPFAR.

The construction of orphan day care and youth centres is taking place with funding from the US Humanitarian Assistance Programme, which has provided over P18.5 million (US $3million) to fund 12 centres covering virtually every major population centre in Botswana. The centres provide daily care, counselling, pre-school and after school programmes for over 800 orphans and vulnerable children. This complements the efforts of the PEPFAR programme.

The disabled

Government is developing a strategy for extending HIV/AIDS services and programmes to the disabled. A needs assessment has been conducted of the various categories of people living with disabilities in relation to HIV/AIDS, and an implementation plan to address the challenges faced by them is being developed. This plan will subsequently be incorporated into the National HIV/AIDS Strategic Plan.



Diagnofirm Medical Laboratories

Pathology you can trust!

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Introduction

Diagnofirm Medical Laboratory was established during October 1990. The motto of the company was to provide professional services to the people of Botswana using state of the art technology on par with the developed countries.

To achieve its motto, the company was the first in Botswana to completely automate its operations. And it was also the first laboratory in Botswana to introduce computerized reporting. Further, Diagnofirm was also the first laboratory in the country to establish a fully equipped laboratory dedicated solely to HIV monitoring (Viral Loads and T Cell Profile). Today, Diagnofirm has the ability to do most of the sophisticated tests available.



The Company's well qualified and skilled workforce is headed by dynamic Promoter and Director of the company, Mr. Mohammed Iqbal Chand. The Company's workforce has ample experience and acumen to support doctors with specialized investigations and reporting.

Diagnofirm with its automation of its operation has reduced the turnaround times for most of the tests. In fact, Diagnofirm provides HIV Monitoring within the same day receipt of samples.

Diagnofirm is also the only laboratory to have results accesses confidentially by requesting clinicians via the internet using our website: www.diagnofirm.co.bw.

Collection Centres

To facilitate doctors and patients, Diagnofirm has collection centre's at the following centres.

- Maun
- Ghanzi
- Orapa
- Jwaneng
- Serowe
- Selebi Phikwe
- Mahalapye
- Mochudi
- Kanye
- Lobatse
- Francistown
- Molopolele

In addition, Diagnofirm has collection centres in all centres where Sprint Courier has its offices. Further, the collection from the above centres are done once a day, except for Francistown where collection is made twice daily.

In our quest to provide the best analytical laboratory services in Botswana, we at DML have recently acquired a State-of-the-art analyser. The Architect Ci-8200 System, supplied by Abbott Diagnostics is only the fourth of its kind in Southern Africa, the other three being in South Africa.

This machine is composed of three modules. The i2000 does 200 Endocrinology tests per hour; the C800 has the capacity to do 800 chemistry tests in an hour whiles the ISE 900 can run 900 electrolyte tests per hour. This machine will help us cope with the ever-increasing demand for medical laboratory services. For the benefit of our clientele and in the name of quality service provision, we shall continue to keep abreast of technology advances.

Quality Assurance

All departments undergo internal QC programs and each department participates in an External Thistle QA Program which is recognized internationally. Where available, each department also takes part in the National QA program from the National Health Laboratory. Certificates of Participation are enclosed to this effect.

All operations of the company are supported by Standard Operating Procedure (SOP) manual. The SOP manual was prepared and is monitored by the internal quality officers of the laboratory. It is endorsed by the concerned department heads and the lab managers.

The SOP's support the company in its endeavor to maintain quality and offer professional services.



In appreciation of our continuous professional and quality services using state of the art technology, we were awarded ***'Arch of Europe for Quality and Technology'***. It was awarded to us by Business Initiative Directions (BED), Madrid, Spain. The award presentation took place in Frankfurt, Germany during the International *Arch of Europe Convention* held on 28th February 2004.

HEALTH PROBLEMS & DISEASE PATTERNS

While infectious diseases remain the most common cause of illness and death there is nevertheless evidence of demographic and epidemiological transitions, which have seen an increase in non-communicable diseases such as hypertension, asthma, cancer, cardiovascular disease and diabetes mellitus. The spotlight is presently moving from curative to preventive treatment, with a programme being established to coordinate the prevention and control of such diseases and a strategy developed in line with global and regional World Health Organisation (WHO) strategies.

Disease trends in the country are closely monitored by the Ministry of Health through various tools, and the establishment of a framework for implementing the Integrated Disease Surveillance and Response (IDSR) to epidemics is at an advanced stage. With the threat of new epidemics such the H1N1 virus, surveillance activities are being intensified and epidemic response and preparedness plans put in place both at district and national levels.

Communicable diseases

In addition to HIV/AIDS, communicable diseases in Botswana include ***diarrhoeal diseases and viral hepatitis.*** Steps have been taken to strengthen partnerships with stakeholders, such as the ministries of Local Government and Minerals, Energy & Water Resources, to prevent water related and sanitation diseases as well as to improve the quality of water consumed at household level. Prevention and control strategies emphasise public education and community mobilisation to promote basic sanitation, hygiene and safety at all levels.

Tuberculosis (TB) is the second leading cause of death in Botswana after AIDS. The rapid escalation of TB cases since the 1980s is primarily due to the advent of HIV, with some 80 percent of TB patients also HIV positive. That said, in recent years TB prevention programmes have met with success. This is reflect in a drop from 623 cases per 100 000 individuals in 2002 to 470 cases per 100 000 individuals in 2007. This is most likely due to the Isoniazid Preventive Therapy (IPT) programme among HIV-positive individuals, better TB programme management and ARV therapy, which helps to protect patients from opportunistic infections.

Botswana continues to strengthen its existing tuberculosis control strategies, such as Direct Observed Treatment Strategy (DOTS), Community TB Care, IPT Programme, laboratory testing methods and intensive training of staff. IPT is given to HIV positive people to reduce their risk of developing active TB. With the advent of drug-resistant TB (MDR and XDR TB), the ministry embarked on a pilot TB/HIV programme for healthcare workers in six hospitals (Princess Marina, Seventh Day Adventist, Scottish Livingstone, Bamalete Lutheran, Athlone, and Deborah Retief Memorial) and two clinics (Bontlen and Gaborone Village).

Government's two major ***malaria*** prevention strategies have included the spraying of houses with residual insecticide and the promotion of the use of insecticide-treated nets in malaria-prone areas. The mild to moderate malaria transmission rates observed during the past four years may be attributed to low rainfall and therefore unfavourable mosquito breeding conditions.

The National Malaria Programme review has been completed with support from the WHO, and a five-year strategic plan developed to address identified gaps and weaknesses. At a regional level there exists a Strategic Plan 2007-2015. Botswana is one of four countries earmarked for Malaria elimination by 2015, which are said to be in Pre-elimination Phase, where the incidence of malaria has gone down to five cases per 100 in the population.

Botswana is implementing the ***measles*** elimination strategy as part of a global initiative. Programmes of accelerated immunisation coverage and case surveillance systems have been put in place in order to satisfy the WHO requirement to declare Botswana a measles-free country. Routine case-based surveillance and follow-up vaccination campaigns continue to be conducted every four years.

Botswana, together with other countries in the region, is committed to eradicating ***polio.*** To this end, strategies recommended by the WHO are being implemented, with the Botswana Polio Eradication Initiative launched in January 2002. Botswana's polio surveillance system has since improved and disease surveillance in general is maintained at an optimal level. This is critical for rapid detection and investigation of possible wild polio virus circulation in any part of the country, especially in high risk districts.

Cases of ***leprosy*** have decreased dramatically in the past decade and an extensive programme has been undertaken in conjunction with the WHO and the Leprosy Mission of South Africa to eradicate the disease in Botswana completely.

PRIMARY HEALTHCARE

By providing preventive, curative and rehabilitative services, the primary health problems of communities are tackled, with emphasis on the promotion of healthy living habits and the prevention of diseases. Essential elements include food and nutrition, occupational health, environmental sanitation, control of endemic communicable diseases, education, immunisation, mother and child clinics, and appropriate treatment for common diseases and injuries. The responsibility for Primary Health Care has recently been transferred from the Ministry of Local Government to the Ministry of Health.

Nutrition, food and safety

The Botswana National Plan of Action for Nutrition (NPAN) embodies the country's efforts to enhance multi-sectoral collaboration and cooperation in improving food and nutrition for all Batswana. In collaboration with the Ministry of Local Government, the Ministry of Health provides food supplements to vulnerable population groups, monitors the quality and safety of food commodities issued at both factory and facility level, and builds the knowledge base of staff responsible for implementing the feeding programme at all levels.

In an effort to prevent and control nutritional deficiencies and other diet-related diseases or disorders, Vitamin A supplementation – so vital for those who are HIV positive – has been intensified to all health districts for children under the age of three. Botswana has adopted the global strategy of eliminating iodine deficiency disorders, the most common cause of preventable mental problems, through universal salt

iodisation. Routine iron and folic acid supplementation for pregnant women is provided through antenatal clinics.

Infants and young children

The Ministry of Health continues to intensify efforts to prevent common childhood illnesses and to promote child health and development in line with MDG 4, which aims to reduce the under-five mortality rate. The National Child Health Strategic Plan is presently being implemented.

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Government has developed the Accelerated Child Survival and Development Strategy, which aims at achieving high impact interventions such as exclusive breastfeeding, complementary feeding, adequate vitamin A supplementation, increased fluid intake and appropriate choice of antibiotic use in pneumonia treatment. Others are immunisation and newborn thermal care and postpartum follow-up.

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The country has met with some successes in child health. The number of underweight children under five years of age attending Child Welfare Clinics has decreased from 10.4 percent in 2001 to about 4.5 percent in 2007. To ensure continued success, and to address nutrition-related complications associated with HIV/AIDS, the ministry is adapting and implementing community-based management guidelines for acute malnutrition in order to identify children at risk for severe malnutrition.

The Reaching Every District (RED) strategy aims at enhancing immunisation of all children under the age of five. In 2008, approximately 90 percent of children under the age of five years were immunised according to international guidelines for childhood diseases. The Ministry of Health strives to maintain these high levels of immunisation coverage for all children in this age group through training health workers, conducting support visits and availing Expanded Programme on Immunisation (EPI) supplies and equipment to health facilities in order to reduce infant morbidity and mortality related to vaccine preventable diseases.

The case management of childhood illnesses is integrated to promote growth and development of infants and young child feeding practices. The integrated management of childhood illnesses (IMCI) at both health facility and household level is meant to improve the management of common childhood health problems, thus improving child health.

A policy on infant and young child feeding developed with the support of UNICEF helps to promote, protect and support optimal infant and young child feeding practices under difficult circumstances, including HIV/AIDS. Intensive training on infant and young child feeding continues to be conducted in order to update health workers and communities on current issues related to child nutrition in the context of HIV/AIDS. These steps have decreased the facility-based total malnutrition rate from about 15 percent in 1995 to less than five percent in 2008.



Sexual and reproductive health

Produced in collaboration with the United Nations Populations Fund (UNFPA), the National Sexual and Reproductive Health Programme Framework was launched in November 2002 to facilitate implementation of the programme of action adopted at the International Conference on Population and Development (ICPD). Goals include the reduction of infant, child and maternal mortality and the provision of universal access to a full range of reproductive healthcare and family planning services.

With family planning having been identified as key to attaining Millennium Development Goal Five to reduce maternal mortality, government provides family planning services to all sexually active individuals free of charge. The management of post abortion care has also been prioritised.

In addition, an assessment of availability, quality and utilisation of emergency care services relating to problems associated with pregnancy and childbirth has been undertaken with a view to identifying factors contributing to maternal deaths. The findings were used to guide and inform the development and implementation of a road map to accelerate the reduction of maternal and newborn mortality. A survey is being conducted to establish the country's maternal mortality rate in collaboration with the Central Statistics Organisation, UNFPA and WHO.

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In Botswana, 97 percent of pregnant women attend antenatal care.

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The National Programme of Action on Male Involvement is intended to enhance the use of sexual and reproductive health services by men as well as positively influencing them to facilitate and support their partners in using these services. Furthermore, youth friendly services, which are a key component of the Adolescent Sexual and Reproductive Health Programme, have been rolled out to all health districts in order to give the youth access to sexual and reproductive health services such as family planning and HIV/AIDS prevention, as well as helping to reduce teenage pregnancy.

Cervical cancer remains a cause for concern among women of reproductive age. The disease accounts for an estimated 25 percent of all cancers in Botswana. To address this problem, a Cervical Cytology Screening Programme is being developed to ensure early diagnosis and treatment. Public education programmes are also underway to ensure that women seek help in time.

Occupational health services

The presence of work-related diseases and injuries among the disease conditions encountered in health facilities nationwide requires the provision of relevant occupational health services as an integral part of the national healthcare delivery system. This service is provided through the Occupational Health Unit (OHU) operating within the Community Health Services Division of the Ministry of Health's Primary Healthcare Department. The unit comprises four functional subunits: Occupational Hygiene, Health Monitoring and Medical Surveillance, Training and Education, Population Family Welfare Education and Services/Sexual Reproductive Health in the Workplace Programme.

The establishment of a Healthcare Inspectorate, which will have the core responsibility of promoting and driving the improvement of the quality of healthcare services in the country, will enable the inspection of healthcare facilities against set standards. This important initiative, which is in line with international trends, will ensure that healthcare services provided in Botswana are of good quality and meet the expectations of today's informed healthcare recipients. The inspectorate will regulate both the public and private sectors equally. The healthcare regulatory department was expected to be fully operational by 2010.

Oral health services

Through the Oral Health Division, the Ministry of Health continues to provide promotive, preventive and curative services to Batswana at referral, district and primary hospital level at 21 health facilities across the country. The school oral health programme includes oral health education, screening and treatment.

Oral health facilities have been opened at Scottish Livingstone, Sekgoma Memorial and Mahalapye hospitals, and dentists have been deployed to the facilities. Mobile dental clinics operate in Lobatse, Selebi-Phikwe, Molepolole and Mahalapye. Opened in 2007, the new Gaborone dental clinic provides a wide range of services while also serving a greater community of patients. It also has a larger and much better equipped dental laboratory.

HOSPITALS & HEALTH SERVICES

Botswana has an extensive network of health facilities in its 27 health districts, and primary healthcare services are integrated within overall hospital services. It is through these structures that preventive, palliative and rehabilitative health services as well as treatment and care of common problems are provided.

The public health system consists in the main of government-run health facilities, which include two referral hospitals (Princess Marina in Gaborone and Nyangabgwe in Francistown), one psychiatric hospital (Sbrana Psychiatric Hospital in Lobatse), seven district hospitals, 17 primary hospitals, 101 clinics with maternity, 171 clinics without maternity, 351 health posts and 844 mobile stops. There is also one private referral hospital and four private district hospitals, with two district hospitals also operated by missions.

The recently completed Sbrana Psychiatric Hospital (formerly Lobatse Mental Hospital) was built at a cost of P350 million, and is among the most modern and well-equipped psychiatric facilities on the continent. Sbrana comprises six complexes, including a Day Hospital, Children's Psychiatric Complex, and Forensic and Rehabilitation complexes; it has 300 beds and a staff complement of 504. Sbrana will also serve as a teaching hospital.

District and primary hospitals refer patients to the three referral hospitals, which offer a wide range of clinical specialities and more advanced diagnostic facilities. Primary hospitals are designed to duplicate on a small scale most of the curative functions provided in district hospitals, and to provide sound primary healthcare services

and referrals.

Princess Marina contains the Botswana-Harvard National HIV/AIDS Reference Laboratory, one of the largest and most sophisticated laboratory and training centres dedicated to the study of HIV, with researchers conducting epidemiological and laboratory-based research on PMTCT and the design and testing of vaccines. Also at Princess Marina, the Botswana-Baylor Children's Clinical Centre of Excellence aims to improve care and treatment of HIV-infected infants and children, enhance the proficiency of health professionals through education and training, establish the necessary infrastructure, expertise and experience for HIV clinical research and serve as a model for the multidisciplinary care of HIV-infected infants and children.

Following an upgrading programme during 2007, the Nyangabgwe Hospital HIV Reference Laboratory is now the second largest reference laboratory in Botswana, with the number of people monitored for HIV/AIDS treatment and care having doubled. PEPFAR has also purchased new equipment that has helped decrease the turn-around time of viral load and CD4 count testing. Furthermore, the laboratory serves as a base for the Early Infant Diagnosis programme which covers the entire northern region of Botswana.

Private hospitals include Gaborone Private Hospital, which offers state-of-the-art oncology treatment and an expanded radiology department, and RMS Private Hospital in Serowe with departments of obstetrics, gynaecology and surgery. There are many private medical practitioners of both modern and traditional medicine, with a number of private medical rescue services and medical aid schemes also available. NGOs and large companies also provide health services, complementing the health-related activities of government.

Diagnofirm Medical Laboratory, established in October 1990, provides professional services using state-of-the-art technology on par with developed countries. It was the first company in Botswana to introduce computerised reporting, as well as being the first in the country to establish a fully-equipped laboratory dedicated solely to HIV monitoring. The recently-acquired Architect Ci-8200 system, the fourth of its kind in southern Africa, has improved analytical laboratory services immensely.

Today, Diagnofirm has the ability to do most of the sophisticated tests available, with the automation of its operations having reduced the turnaround time for most tests. The company has collection centres in most towns and major villages across Botswana. It is also the only laboratory to have results accessed confidentially by requesting clinicians via its website. Diagnofirm has been awarded the 'Arch of Europe for Quality and Technology' by Business Initiative Directions in Madrid, Spain.

The Primary Healthcare system, which was formerly administered by council health departments of local authorities under the Ministry of Local Government, is now the responsibility of the Ministry of Health. The Primary Health Facilities Programme provides basic health facilities in the form of health posts, clinics, maternity wings, nurses' houses, ambulances, clinical waste vehicles and incinerators, as well as furniture and equipment.

Health posts are staffed by both a family welfare educator and a nurse. A village development committee selects the welfare educators who are sent for training at central level – they are the community's first point of contact and referral to higher-level health personnel. Supervisory personnel visit all health posts on a regular basis in order to complement the work of regular staff. The next level in the healthcare system consists of clinics, where nurses cover a wider range of educative subjects and provide full preventive and curative care. Specialists also plan and organise programmes for oral health, mental health, and the prevention of blindness.

Upgrading of health facilities

Overcrowding is a problem in many hospital wards, in particular medical wards due to the large number of HIV/AIDS patients, and the upgrading of hospitals is taking place across the country in order to provide better quality health services.

Hospitals upgraded under the Improvements to Hospitals programme include Scottish Livingstone, Sekgoma Memorial and Mahalapye, with Sbrana Psychiatric Hospital opened in 2010. Sekgoma Memorial, Mahalapye and Scottish Livingstone now offer selected specialist services such as paediatrics, surgery, internal medicine, obstetrics and gynaecology, anaesthesia and ophthalmology in order to decongest Nyangabgwe and Princess Marina. The upgrading of Maun General Hospital (now Letsholathebe II Memorial) has been completed.

Additional emphasis on good mental health comes in government's commitment to ensuring universal access to rehabilitation and mental health facilities. In keeping with this, the Ministry of Health has acquired a plot in Gaborone where the National Rehabilitation and Referral Centre is being built.

The P700 million Bokamoso Private Hospital, which opened during 2010 in Mogoditshane, is a good example of the public-private partnership (PPP) model required to improve and further expand healthcare services in the country. Bokamoso is owned by the Bokamoso Private Hospital Trust, formed by the Botswana Public Officers Medical Aid Scheme (BPOMAS) – with a 50 percent contribution from government – and PULA Medical Aid Fund. The hospital has already attracted a number of world-renowned experts and will also form partnerships with high-level global academic institutions to participate in expanding local healthcare delivery and skills development capabilities.

HUMAN RESOURCES

The National Health Policy stresses that staffing of health services must be adequate, equitable and efficient. Considerable investments have been made in human resources, with training taking place in local institutions as well as abroad. Continued improvements in healthcare infrastructure have created a need for more specialised services and, as a result, more specialised staff. In addition to formal training courses, emphasis is placed on post-basic training and continuing in-service training to upgrade and update skills.

In response to current human resource challenges, the Ministry of Health has developed the Human Resources for Health (HRH) Plan, covering the 2006-2016 period,

to rationalise available human resources and guide the ministry in optimally utilising available resources while securing those resources that are not available. It also emphasises ways to determine the skills mix of the health workforce required in order to effectively and efficiently operate health service facilities. The plan, which will be accompanied by a policy to guide its implementation, together with continued training of staff on public relations and service, is essential to achieving the Vision 2016 pillar of a 'Compassionate, Just and Caring Nation'.

For the training of nurses and allied personnel, there are six Institutes of Health Sciences (IHSs) and two Mission Colleges of Nursing, which offer diploma health programmes. The University of Botswana (Faculty of Health Sciences) also offers some degree and masters health programmes. The Ministry of Health is to establish a Human Resources Training Council, which will be responsible for the training of health personnel.

A Pre-medical Programme was established at the University of Botswana in 2000 in order to increase the complement of local doctors, with students placed at partner medical institutions in South Africa and abroad following completion of the programme. A Medical School is currently being set up at the university and, in this regard, construction began on the new Faculty of Health Sciences facility (which includes a teaching hospital) during 2008. In addition, major hospitals like Nyangabgwe and Princess Marina are being upgraded to support the Medical Education Programme.

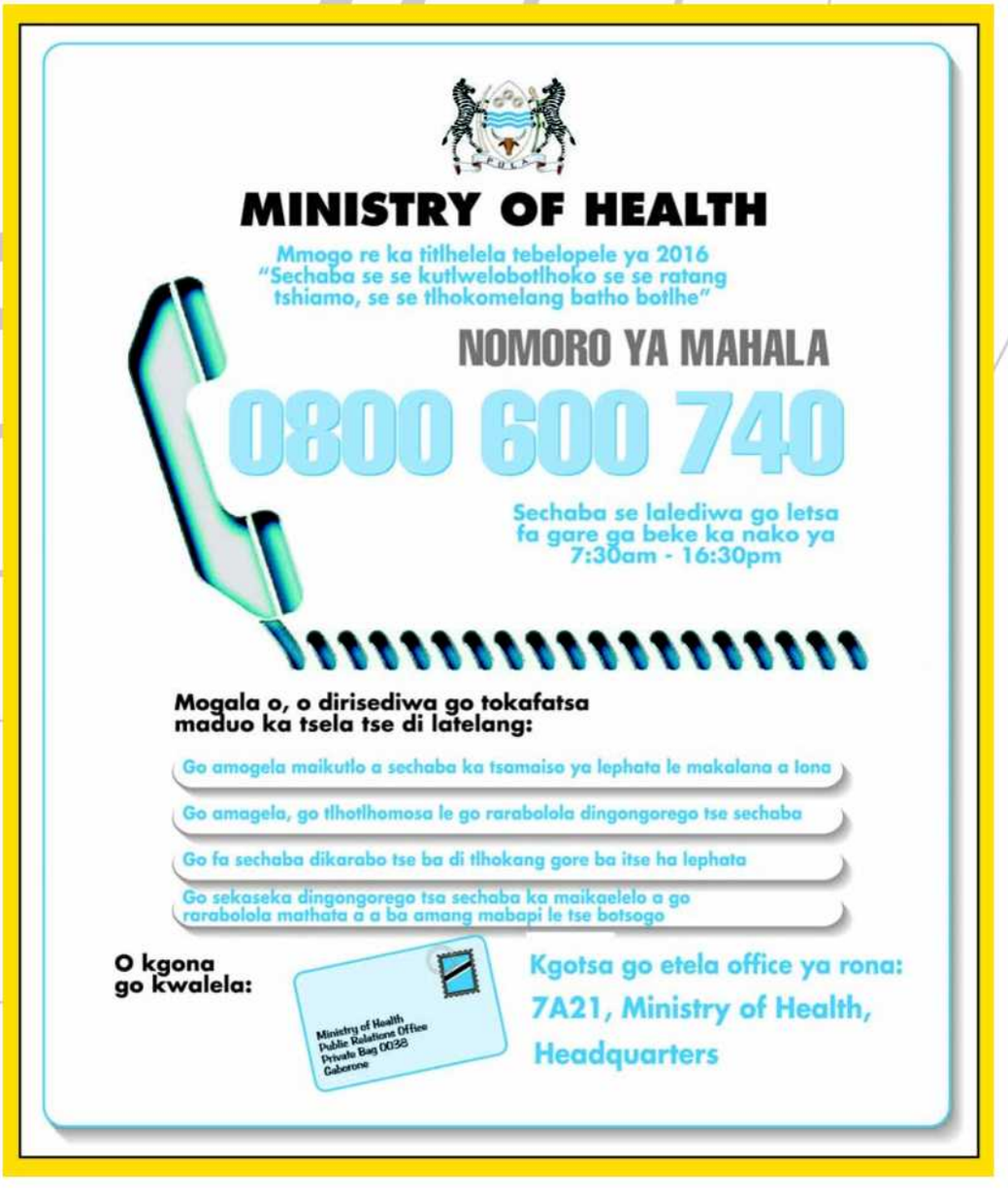
Health personnel shortages

The health sector has been challenged over the past several years by personnel deficits, both in terms of quantity and quality; a situation that has been exacerbated by the need to support HIV/AIDS programmes. At the same time, the emergence of similar programmes and interventions in other parts of the continent and increases in development assistance have narrowed the options for external recruitment as well as the ability to retain staff within the public sector. To address these challenges the Ministry of Health is developing an attraction and retention strategy.

Programmes to deal with health personnel shortages have include the expansion of the IHSs, as an appropriate long-term strategy to address the lack of health manpower. Furthermore, aggressive recruitment drives have been undertaken to fill available vacancies. In order to retain existing staff, efforts made to improve the workplace environment include a wellness programme for health workers and the provision of additional staff accommodation.

In recent years, the ministry has reported reduced migration of staff members and professionals to other countries, and noted the welcome return of a number of professionals who were trained outside the country. Botswana has been selected to serve in the Global Health Worker Migration Advisory Council, which looks at issues concerning international migration of healthcare workers.

Regarding the shortage of laboratory scientists, a programme seeking to upgrade medical laboratory technicians to degree level has been developed with the University of Botswana.



EDUCATION AND TRAINING

The development of an education sector that allows for the fostering of competitive and productive human resources is central to Botswana's current education policy.

The Ministry of Education and Skills Development was awarded the largest share of the recurrent budget in 2010/11 at P8.3 billion, and the fourth largest share of the development budget at P1.5 billion. Secondary Schools construction is the largest programme, at P1.28 billion, and accounts for 86 percent of the ministry's budget.

Current priorities within the sector encompass ensuring universal access to ten years of basic education; increasing access to senior secondary education; expanding vocational and technical training and promoting lifelong learning;



STUDENTS IN SCIENCE LESSON

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increasing tertiary education participation and attainment rates; and enhancing access to education services by those with special needs.

As a result of the substantial investments which have been made in education, 100 percent access to primary education was attained in 2000, with the transition from primary to junior secondary now also standing at 100 percent. The remaining challenge is to increase the transition from junior to senior secondary school.

The present challenge is to focus on areas that will improve national productivity and accelerate growth of the economy. To achieve transformation, diversification and long-term economic growth, the education sector needs to undergo a comprehensive reform programme aimed at ensuring efficiency in resource utilisation and provision of quality and competitive programmes.

To this end, implementation of the National Human Resource Development Strategy and the Tertiary Education Policy began in 2009. The strategy will guide training and facilitate the matching of skills with labour market needs. This includes the revised Junior Secondary School curriculum, with implementation having started 2010, and caters for some of the critical areas of entrepreneurial and life skills. The Internship Programme has also been important in facilitating skills development and transfer to unemployed young Batswana graduates, and continues during 2010/11.

The establishment of the Botswana International University of Science and Technology (BIUST) is a major milestone in Government's effort to transform Botswana's economy from one that is resource-based to one that is knowledge-based. To further augment these initiatives, Oodi College of Applied Arts and Technology was scheduled to be opened in the same year with an initial intake of about 350 students. To accelerate implementation of vocational training reforms, the combined regulations for registration and accreditation of training institutions are expected to be undertaken during the 2010/11 financial year.

In order to attract, motivate and retain manpower with critical skills, on 1 April 2008 government introduced the Scarce Skills Allowance and undertook the Scarce Skills Audit in 2009/10 to determine the impact the allowance had had in filling the gaps experienced due to the shortage of skilled manpower as well as on the retention of experienced personnel in the affected cadres.

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Botswana's education system aims to provide accessible, equitable, quality, relevant and lifelong education and training.

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National Human Resource Development Strategy

Approved in January 2009, the National Human Resource Development Strategy (NHRDS) is a macro-level initiative to ensure that 'by 2020 it will be universally accepted that the quality, productivity and motivation of its people will be Botswana's single greatest and most valuable resource'.

The NHRDS is at the core of transforming Botswana from a Stage 1 Factor Driven Economy (reliant on natural resources and unskilled labour) to a Stage 2 Efficiency Driven Economy with higher value and quality jobs, higher wages, efficient production processes, increased product quality and efficient markets, while harnessing the benefits of existing technology. This will lay the foundation for the subsequent evolution of the country into a Stage 3 Knowledge and Innovation Economy, which will provide a high standard of living and the associated high wages by producing new and innovative goods, developing sophisticated production processes with well-educated and highly trained 'knowledge workers'.

The NHRDS is at the apex of a number of strategic interventions designed to strengthen Botswana's education and skills training system, with the current institutional framework made up of an uncoordinated set of fragmented sub-systems which is insufficient to respond to the national agenda of transformation and economic diversification. The strategy articulates an overarching vision to enhance the coherence and effectiveness of what has been established, including existing education councils and training authorities and new and emerging initiatives. It also seeks to develop new system level structures and ways of doing things that will improve the alignment of national human resource development and enhance the employability and economic benefits of its citizens.

The Human Resource Development Advisory Council (HRDAC) was established in July 2009 as a non-statutory body tasked with driving the implementation of the NHRDS up until 2012, whereafter its work will be taken over by the statutory Human Resource Development Council (HRDC). Derived from the NHRDS implementation framework, the advisory council's specific actions to be undertaken between 2010 and 2012 include:

- Development and approval of HRDC legislation
- Design and establishment of the HRDC
- Establish and operationalise six sectoral committees
- Develop six sector-specific human resource plans
- Develop a synoptic NHRD plan to inform the mid-term review of NDP 10
- Design and ready NHRD planning and data systems for establishment
- Provide strategic advice to government on the implementation of the NHRDS
- Initiate the annual NHRD conference and NHRDS performance report by 2012
- Communication, stakeholder engagement, change management and capacity development

PRIMARY & SECONDARY EDUCATION

Investment in education has seen a huge increase in the number of schools and pupils enrolled. From a mere 250 primary schools and nine secondary schools in 1966, there were 786 primary schools and 271 secondary schools by 2008; with enrolment rising from 72 000 primary school pupils to 329 125, and 1 500 secondary school students to 172 933, over the same period (figures for 2008 include both public and private schools). Furthermore, the enrolment level of girls in Botswana's schools is now on par with that of boys.

Written at the end of Standard 7, the Primary School Leaving Examination (PSLE) is used to determine the extent to which pupils have attained the objectives of the primary education system and whether they are adequately prepared to cope with subsequent levels of education. Children may then proceed to community junior secondary schools (CJSSs) for a three-year junior certificate programme, culminating

DEPARTMENT OF CURRICULUM DEVELOPMENT & EVALUATION

CURRICULUM PROGRAMMES & SUPPORT

TEL 395 2990 / 364 7500 • FAX 397 3842 • www.moe.gov.bw.cde/index.html

MISSION

To design, develop and evaluate quality and relevant National Curriculum and support services for all learners across Basic education levels.

... A hallmark for quality and relevant national curricula!

The Department of Curriculum Development and Evaluation (CD&E) has the overall responsibility of providing leadership in improving the quality of education through curriculum review and revision. It directs, co-ordinates and monitors curriculum review for Pre-Primary, the Ten-Year Basic Education and Senior Secondary Education programmes. The Department also plans for and develops appropriate instructional materials to support implementation of the curriculum and the education system.

The Mandate of the Department is undertaken through five divisions:

CURRICULUM DEVELOPMENT DIVISION

It is responsible for analysing general policy statements and translating these into more specific aims and objectives, which can be put into practice in schools. It co-ordinates and supervises the development and evaluation of curriculum programmes nation wide. It develops syllabuses for the Ten-Year Basic Education and Senior Secondary programmes. Curriculum programmes involve both content and methods, therefore the Division also assists in the development of strategies for implementation. The Curriculum programmes that are developed by the Division take cognisance of the strengths, weaknesses and capabilities of individual students. This is to make sure that the curriculum also caters for children with special needs.

EDUCATIONAL BROADCASTING DIVISION

Develops, produces and broadcasts appropriate radio programmes to supplement classroom instruction.
The Division also disseminates information on government policies and issues of interest in education to teachers and the public.

TEACHING AIDS PRODUCTION DIVISION

Develops appropriate teaching/ learning aids to support teaching/ learning.

GUIDANCE AND COUNSELLING DIVISION

Develops, co-ordinates and monitors guidance and counselling services provided in schools. Guidance and Counselling services support the overall development of the individual. The programme aims at meeting the personal, social, educational, emotional and vocational needs of learners.

EDUCATIONAL PUBLICATIONS DIVISION

Develops materials to supplement the curriculum in the form of magazines, which are targeted for Primary School children. The Division also undertakes Public Relations activities for the Ministry of Education, disseminating information about on-going innovations and activities of the Ministry, through print.

The 1994 Revised National Policy on Education, which forms a basis for a well-informed and educated nation recognises that it is paramount that the first 10 years of education be appropriately aligned to what the nation aspires to; that is, to prepare Batswana children for the transition from a traditional agro-based economy to the industrial economy, as espoused in the Revised National Policy on Education (RNPE), Government Paper No. 2 of 1994. In order to achieve that, the department has undertaken the following programmes:

- ***Pre-Primary Education was introduced in 2010***, in order to improve the quality and access to education for all learners in Botswana.
- The ***Senior Secondary Curriculum*** has just been evaluated and the evaluation will inform the review and revision of the Senior Secondary Curriculum.
- A ***National Life Skills Framework***, which will guide the nation in equipping learners with lifeskills that will help them lead a successful life in and out of school, has been developed.
- ***Psychometric Tests***, that can be used from primary to tertiary level to give balanced views of individual learner capabilities are being developed. The tests will assess aptitude and personal interests.
- A ***Sign Language Resource Book*** for all learners, that will be used by schools to standardize the Signs used in Botswana schools.
- A ***revised Junior Certificate Curriculum*** which was used to take on board national aspirations as espoused in *Vision 2016, the Dakar Framework of Action and the Millennium Development Goals were implemented in 2010.* The revision also allowed the curriculum to address emerging, natural, economic and psycho-social issues such as HIV and AIDS that were not priorities in the 1990's.









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in the Junior Certificate Examination (JSE). After completing junior secondary education, pupils may advance to senior secondary schools.

A number of private English-medium primary and secondary schools and colleges supplement government schools. Some advantages to private schools include a greater number of facilities as well as extra lessons for slow learners. In addition to this, private schools and colleges are affiliated to various international examining bodies, with Cambridge certificates obtainable in exams such as the IGCSE and HIGCSE. Local colleges also offer international commercial, computer and business certificates through, among others, the UK-based Institute for Management of Information Systems (IMIS) and Institute of Commercial Management (ICM).

Pre-Primary and Primary Schools

In 2008/09, government introduced and began implementing Early Childhood Care and Education Policy Guidelines in all urban and district councils in the country. This included the overhaul of primary education curricula to place greater emphasis on mathematics, science and entrepreneurship.

Pre-primary schools in Botswana have traditionally been run and administered by private individuals with few external quality control measures or standards enforced. As such, pre-primary education still faces both structural and access challenges. There is currently a move within government to assume greater responsibility for running pre-primary schools in order to improve the quality of education offered at this level.

The Pre-Primary Curriculum Framework was developed in 2008 as a national guide to planning appropriate Integrated Early Childhood Development (IECD) activities for children between the ages of three and six to enable them to achieve their full potential. The framework comprises six learning areas: Personal, Emotional and Social Development; Language Development and Early Literacy; Health, Nutrition and Safety; Mathematical and Scientific Thinking; Physical, Creative and Aesthetic Development; and Moral and Spiritual Guidance.

In primary schools, developments in recent years have seen the number of learners per class reduced to 40; a step augmented by the launch of the Primary Schools' Facilities Backlog Eradication Project and the Primary School Facilities project. Statistics show that enrolment and retention at primary school level has not declined despite the impact of HIV/AIDS. This is mainly due to the social safety nets available to orphans and vulnerable children.

There are, however, still some children not accessing schooling and some dropping out of school. In accordance with Botswana's Millennium Development Goal (MDG) obligations, these children are to receive renewed focus through increasing access to pre-primary education and mainstreaming initiatives such as Circles of Support, a programme that mobilises parents, educators and communities to work together in creating a favourable study environment for students.

Junior and senior secondary schools

Some 86 percent of the Ministry of Education and Skills Development's budget for 2010/11 has been allocated for the construction of secondary schools. Existing junior and senior secondary schools are being expanded and new schools built in order to ensure that all Batswana continue to receive ten years of basic education as well as to increase further access to senior secondary education.

The transition rate from junior to senior secondary schools has steadily increased from 49 percent at the beginning of NDP 9 to 67 percent in 2008. Goodhope Senior Secondary School is operational, and with the completion of other senior secondary schools in Nata, Shakawe, Mogoditshane and Mmadinare – scheduled for December 2010 – will provide an additional 4 800 form places and raise the transition rate to senior secondary education to 70 percent.

Curriculum development

The main function of the Department of Curriculum Development and Evaluation is to develop, review and revise primary, junior and senior secondary curricula to meet the socioeconomic requirements of the country as well as individual needs. The department also provides guidance and counselling services aimed at assisting young Batswana in dealing with a range of complex socioeconomic challenges, as well as producing ministry publications and reports on developments in education.

Changing societal needs have resulted in the infusion and integration of emerging issues into the curriculum at all levels. These include HIV/AIDS, Population and Family Life Education, Environmental Education and Information and Communications Technology (ICT). Life skills programmes are also central to enabling informed decision-making.

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The implementation of the revised Junior Secondary School curriculum began in 2010 and caters for some of the critical areas of entrepreneurial and life skills.

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The new primary curriculum that was developed in line with the 1994 Revised National Policy on Education and Vision 2016 is now being implemented in schools. A revision of the senior secondary curriculum is also to be undertaken.

Examinations

The Botswana Examination Council (BEC), a semi-autonomous professional examinations body, is responsible for the overall management of examinations in the country. The council was created in order to regularise the many and diverse aspects of the education system in Botswana, giving credence and confidence to the conduct of examinations in the country.

Its mandate covers Standard 4 examinations in primary schools, Primary School Leaving Examinations, the Junior Certificate and the Botswana General Certificate of Secondary Education (BGCSE). Full localisation of senior secondary examinations was achieved through the introduction of the BGCSE, which replaced the Cambridge GCE O level examination.

SPECIAL EDUCATION

With the advent of new technologies and a changing socioeconomic environment, there are many children in schools presenting with diverse educational and developmental needs. Special Education Services in the Ministry of Education and Skills Development aims to ensure that all citizens of Botswana, including those with special educational needs, have equality of educational opportunities. This is achieved

MINISTRY OF EDUCATION

REPUBLIC OF BOTSWANA

DEPARTMENT OF TEACHING SERVICE MANAGEMENT

Introduction

The Department of Teaching Service Management (TSM) is the Teacher Employment arm of the Ministry of Education. It was established in 1976 through an Act of Parliament, the Teaching Service Act, Cap 62:01. Its main role is to provide quality teachers to the education system through timely recruitment and equitable distribution of teachers to all Government and Government-aided schools in Botswana. The Department is headed by a Director assisted by a Deputy Director and five Assistant Directors. It is manned by 108 professional officers with an establishment of well over 24 000 Primary and Secondary School Teachers, including College Lecturers.

The Department's mission is based on the following values:

• Transparency • Botho • Honesty • Team Work

The foundation for the powers and functions performed by the Department are:

- The Teaching Service Act & Regulations
- The Teaching Service Code of Regulations
- The Teaching Service Management Directives
- The Teaching Service Management Circulars
- The Revised National Policy on Education of 1994

Divisions and Functions

Six Divisions constitute the Department as indicated below:

1)Departmental Management Division

It is responsible for:

- Management and maintenance of staff welfare
- Budget (finance and manpower) administration
- Administration of transport
- Procurement and management of resources
- Staffing of the Department & Regional Offices
- Quality Services

2) Procurement and Placement Division

It is responsible for:

- Recruitment and appointment of new Teachers from Universities and Colleges of Education
- Staffing Government and Government-aided schools
- Employment contracts administration
- Teacher transfers and postings

3) Teacher Salaries Administration Division

It is responsible for administration of:

- Teacher salaries
- Compensation
- Terminal benefits (gratuities)
- Pensions

4) Manpower Planning Division

It is responsible for:

- Planning and budgeting for the Teacher Service
- Management of the Establishment register
- Management of information systems
- Management services

5) Manpower Administration Division

It is responsible for management and maintenance of:

- Suitable Conditions of Service
- Teacher welfare
- Administration of Botswana Public Officers Pension Fund (BPOPF)
- Loan Schemes - motor vehicle and residential property loan schemes
- Botswana Teacher's Day and awards

6) Teacher Training and Development Division

It is responsible for management, coordination and administration of:

- In-service training of teachers
- Administration of the training fund
- Assessment and determination of training needs in the Teaching Service
- Liaison with training institutions
- Evaluation of training programs

7) Departmental Performance Improvement Unit

The Unit's role is to handle performance improvement for the whole of Teaching Service Management.

- Reforms
- Reformance reviews of staff
- Annual performance plans
- Quarterly progress reviews to the regions under the Organisation and Methods review exercise of the Ministry of Education.

Decentralised Functions to the Regions

The Department, in its efforts to improve service delivery to teachers, decentralized some of its functions to the user Ministries and Departments. Some of the decentralised functions include the promotion of teachers up to Senior Teacher Grade 1. More functions of the department are to be decentralised.

Relations with Stakeholders

The Department maintains active working relations with other stakeholder Departments through:

- Holding consultative meetings with Supervisory Departments
- Participation in Teacher Service Consultative Committee
- Participation in the National Committee on Teacher's Day.

Department of Teaching Service Management
Tel: 3657300 • Fax: 3975315 • E-mail: tsm.registry@gov.bw
Website: http//www.moe.gov.gov.bw/tsm/entry.html

through the provision of free comprehensive assessments that are based on the child's learning and developmental needs.

Assessments are provided by a team of multidisciplinary professionals including educational psychologists, speech and language therapists, occupational therapists, physiotherapists, low vision officers and remedial therapists. Following assessments, learners with special educational needs are supported through different interventions that are specific to their needs. Special Educational Services is also involved in the thorough monitoring of special educational programmes in educational institutions, and collaborative partnerships with government ministries and non-governmental organisations (NGOs).

STUDENT PLACEMENT & WELFARE

The Department of Student Placement and Welfare operates within the context of the overall objective of the Ministry of Education and Skills Development, preparing Batswana for useful and productive lives, with the emphasis on training to meet the manpower needs of the economy.

The department is charged with the responsibility of providing financial assistance to pre-service, post senior secondary education and training in the form of loans through the grant/loan scheme.

The department further administers scholarships and students on training. It currently administers over 90 percent of the students at the University of Botswana, Botswana College of Agriculture, Institute of Health Sciences, Secondary Colleges of Education, Primary Colleges of Education, Botswana Accountancy College, Botswana Institute of Administration and Commerce, Roads Training Centre and Vocational Training. It also sponsors and administers students in other accredited institutions regionally and internationally.

OUT OF SCHOOL EDUCATION

Following a comprehensive evaluation of the National Literacy Programme, the Department of Out of School Education and Training (DOSET) is overseeing the transformation of the former non-formal education programmes into three out-of-school programmes; namely, Adult Basic Education, Post Literacy and Life Skills, and Out of School Education for Children.

DOSET launched the new Adult Basic Education Programme (ABEP) in February 2010. The ABEP framework integrates the ongoing curricular components of literacy and post-literacy into a comprehensive and coherent curriculum. The programme articulates general education with technical and vocational education, while combining knowledge and skills, theory and practice, scientific knowledge and popular wisdom, life and work-oriented competencies.

ABEP has an open curriculum that does not prescribe or detail contents and activities, but rather provides broad criteria and guidelines to understand the foundations of the curriculum and its practical implications for teaching. This creates room for facilitators and learners to interpret and adapt the curriculum at local level. While primary education consists of two levels, the programme is organised in three levels, comprising Level One (Standard One to Two), Level Two (Standard Three to Four) and Level Three (Standard Five to Seven).

The intention of ABEP is to reach the out of school population that has never attended school, or that dropped out before learning to read and write or before completing primary education. Special focus is placed on rural areas, given the fact that almost half of Botswana's population lives in rural areas and that these areas have much higher levels of poverty, unemployment and illiteracy, which stands at 34.3 percent compared to 14.6 percent in urban areas, as well as few educational opportunities.

The most common local language is used as the medium of instruction in the initial stages of the programme to encourage participants to acquire basic literacy and to further understand and develop the language by using Setswana as a medium of instruction and a subject area, while introducing English as a second language.

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PUBLIC LIBRARY PROJECT

Sesigo, a project aimed at transforming and bringing the Botswana's public library services in line with the modern information age, was launched in Thamaga during 2010. Run by the African Comprehensive HIV/AIDS Partnership (ACHAP), together with the Ministry of Youth, Sports and Culture through the Botswana National Library Service (BNLS), the project facilitates the use of computers and free internet access at libraries countrywide.

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Distance education

The Botswana College of Distance and Open Learning (BOCODOL) offers quality distance education in accordance with international standards, extending education and training opportunities to out-of-school youth. The College has, in addition to its headquarters in Gaborone, five regional offices in Gaborone, Francistown, Palapye, Maun and Kang that operate through study centres countrywide.

BOCODOL offers a wide range of courses, starting from school equivalency courses comprising Junior Certificate (JC) and Botswana General Certificate of Secondary Education (BGCSE), for the out of school youth who either want to improve their grades or are enrolling at these levels for the first time. The college also currently offers professional and vocational courses at various levels, ranging from certificate courses to diploma programmes and degrees. An array of short courses is also offered.

The defunct Lobatse College of Education is to be jointly used by Department of Out of School Education and Training and the Botswana College of Distance and Open Learning, serving the entire Southern District.

TERTIARY EDUCATION

Access to and quality of tertiary education has improved tremendously since 1965, when secondary schools produced just 16 students of requisite standard to undertake higher education and the number of Batswana degree holders was only about 40. Overall student enrolment in tertiary education institutions has increased by over 40 percent, from 20 011 in 2003/04 to 47 889 in 2008/09.

Government continues to develop tertiary

TEL: 3655600 REPUBLIC OF BOTSWANA FAX: 3906610

Ministry of Education & Skills Development

DEPARTMENT OF TEACHER TRAINING AND DEVELOPMENT



The mandate of the Department of Teacher Training and Development is two pronged: provision of pre-service and in-service teacher training. It offers a three year teaching Diploma through the Colleges of Education. It also provides support for professional development of teachers through provision of relevant and responsive programmes specifically designed to meet the needs of teachers in the field. The overall objective of the Department is to improve the quality of primary and secondary teaching through teacher preparation.

During the reporting period, the department's key objectives are:

- To increase access and equity to teacher education and training
- To improve quality of teacher education
- To improve quality of service



Our vision is to be a world class provider of quality, accessible and equitable life-long education and training.



Our mission is to provide quality teacher education, training and professional development to produce competent and competitive teachers. **Our Values are:** Botho, Team work, Creativity and innovativeness, Transparency, Thuto and Quality service.

Some of the projects run by In-Service are:

✦ SMASSE (Strengthening of Mathematics and Science in Secondary Education)

SMASSE trains secondary school teachers in interactive methodology, especially using ASEI/PDSI approaches. ASEI stands for Activity, Student, Experiment, Improvisation and PDSI stands for Plan, Do, See and Improve. It uses local content for better understanding by learners. To date about 82% of junior secondary Mathematics and Science teachers in the West, Central, North and South Regions have been trained in SMASSE methodology.

✦ Know About Business

KAB is a training programme which aims to create awareness of enterprise and self-employment as a career option for students in secondary schools and trainees in vocation and technical training institutions. It is being delivered side by side with the Corporate Entrepreneurship Training programme, and seeks to build capacity for the mainstreaming of entrepreneurship education in Botswana. KAB has been introduced in senior secondary schools to Form 4 students effective 2009.

✦ Teacher Capacity Building

This is one of the strategies adopted by Government to contribute towards HIV & AIDS prevention through strengthening the capacity of the education and communication sectors in the provision of an interactive, distance education on HIV and AIDS for teachers. It is delivered in partnership with Botswana Television (Btv). Over the years the Talk Back programme has made notable international recognition as an innovative intervention addressing a development challenge.

In September 2004, Talk Back won the High Way Africa Media Award, and in 2008 achieved second place in the Global South Development Expo and was a finalist in the Commonwealth Education Good Practice Award in June 2009.

✦ Diploma in Primary Education by Distance Mode

This programme aims to upgrade primary school teachers to a minimum of diploma qualification in order to improve the quality of teaching in schools. To date 1961 teachers have graduated from the programme.

✦ School Library Project

The project aims to cultivate a culture of reading among school going children by encouraging schools to develop resource rooms. The most important feature of this programme is promotion of community partnerships in education. The project was introduced in the Southern Region by Kanye Education Centre and is doing very well.

✦ Breakthrough to Literacy

Breakthrough was first developed in England by the Schools Councils and has since spread to many countries, Botswana being one of them. The project was developed as a first language literacy course for the first years of school.

In Botswana, the Breakthrough to Literacy method is used to teach learners to read and write Setswana during the first year of school. Development of primary level teachers in the use of the method begins during the pre-service training and continues during the service. The method is based on the language experience in their daily life. It also provides opportunity for a careful assessment of the learners' readiness through the pre activity stage.

Breakthrough method is unique in that it uses a combination of methods. It is not reliant on one method, as other reading courses in the past have been. It is a child-centered approach that treats every child as a unique individual. The teacher facilitates the learning and development of skills such as Questioning, creating, investigating and discovering the world around them.

Contacts of Teacher Training & Development institutions

COLLEGES OF EDUCATION			EDUCATION CENTRES		
INSTITUTION	**ADDRESS**	**CONTACT/ Tel**	**INSTITUTION**	**ADDRESS**	**CONTACT/ Tel**
Tlokweng	Private Bag T01, Tlokweng	3928351	***Tsabong***	P.O. Box 288, Tsabong	6540210
Serowe	Private Bag 9, Serowe	4630448	***Kanye***	P.O. Box MK27, Kanye	5447876
Francistown	Private Bag 24, Francistown	2412293	***Tloweng***	Private Bag T02, Tlokweng	3928682
Tonota	Private Bag T3, Tonota	2484295	***Molepolole***	P.O. Box 1293, Molepolole	5921746
Molepolole	Private Bag 008, Molepolole	5920275	***Mochudi***	Private Bag 23, Mochudi	5777846
			Mahalapye	P.O. Box 131, Mahalapye	4711744
			Serowe	P.O. Box 417, Mahalapye	4630491
			Selibe-Phikwe	P.O. Box 697, S/Phikwe	2611018
			Francistown	Private Bag 69, Francistown	2410157
			Kasane	P.O. Box 162, Kasane	6250517
			Maun	P.O. Box 597, Maun	6860348
			Gantsi		6596257/8

education in the country by expanding existing institutions and creating new ones. In addition to the expansion of UB and other public tertiary institutions, the development of the Medical School and teaching hospital and the Botswana International University of Science and Technology (BIUST), the creation of a number of private tertiary institutions is being encouraged through the Tertiary Education Council (TEC). A licensing and oversight body, which offers sponsorship to Batswana students in licensed private institutions, the TEC is responsible for the coordination of tertiary education and for the determination and maintenance of standards of teaching, examination and research in tertiary institutions in Botswana.

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The Department of Tertiary Education and Financing received P2.356 billion in the 2010/11 budget, of which P2.318 billion was for support to students already on government sponsorship.

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Local private tertiary education is of particular importance in view of the high cost of external placement, and it is both financially and socially advantageous for students, especially at undergraduate level, to undertake their studies locally. A variety of emerging tertiary institutions are already offering diploma or degree programmes.

There are currently six private tertiary institutions, which are also affiliated to the Botswana Association of Private Tertiary Education Providers (BAPTEP). Institutions include NIIT (based in India with branches in Gaborone and Francistown), the Gaborone Institute of Professional Studies (GIPS), ABM University College in Francistown, New Era College, Ba Isago University College with branches in Gaborone and Francistown, and Limkokwing University of Creative Technology (with headquarters in Malaysia and a branch in Gaborone).

Limkokwing University Botswana, which started operating from Fairgrounds Mall in 2007, opened another campus in Block Six in June 2007 before moving to its main campus in July 2008. It has 611 staff members, 502 of whom are local. The class of 2009 graduated local students as well as international students from Lesotho, Kenya, South Africa and Swaziland.

Tertiary Education Policy

The comprehensive Tertiary Education Policy approved in April 2008 laid the foundation for major reforms in the tertiary education subsector in line with Vision 2016 and national development plan objectives. The overall goal of the policy is to achieve sustainable social and economic development and uplift the standard and quality of life of Batswana through the development of a tertiary education system that is relevant, dynamic, accessible, equitable and internationally competitive.

The new policy outlines strategies to be adopted over the next 20 years to address challenges related to the access, quality and relevance (content) of Botswana's tertiary education. It also aims to ensure that the country's tertiary institutions produce valuable and relevant research results to support industry and overall development. Implementation of the policy began with the establishment of a Higher Level Multi-Stakeholder Team. Furthermore, a Tertiary Education Funding Model has been developed that targets governance and efficiency of public tertiary institutions.

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The Tertiary Education Policy recommends the increment of the tertiary education gross enrolment ratio from the current 11.4 percent to at least 17 percent by 2016 and 25 percent by 2026.

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TECHNICAL & VOCATIONAL TRAINING

The Ministry of Education and Skills Development in collaboration with the Ministry of Labour and Home Affairs and other stakeholders supervises and provides vocational training to Batswana through the Department of Vocational Education and Training. Facilities for technical training as well as vocational education are provided at colleges of technical and vocational education (CTVEs) and technical colleges (TCs), which concentrate on vocational and technical training within the framework of the Botswana Technical Education Programme (BTEP).

The National Policy on Vocational Education and Training of 1997 and the Vocational Training Act of 1998 led to the establishment of the Botswana Training Authority (BOTA), which coordinates vocational education and training below diploma level. BOTA is a parastatal organisation under the Ministry of Labour and Home Affairs, and ensures quality control of both government and private vocational education and training institutions. BOTA is currently being merged with the TEC under the Ministry of Education and Skills Development.

In order to foster economic development and global competitiveness, the focus is on developing training that is relevant and responsive to the rapidly changing socioeconomic and technological environment. Current challenges within the system have been identified as follows:

- Lack of adequate library facilities, especially in private training institutions
- A high proportion of foreign trainers in private institutions
- A large percentage of under-qualified trainers, particularly the brigades
- Lack of programme variety resulting in excessive specialisation in a narrow group of qualifications

A number of initiatives are underway to address these challenges. Offerings under the BTEP continue to increase, with courses having been developed at foundation and certificate level in eight vocational areas. High quality Advanced Certificate and Diploma Level programmes have been developed covering sectors such as engineering, business and commerce, information and communications technology, multimedia, tourism, hospitality and catering, and health and beauty, which are being offered at the Francistown Technical College and at the colleges of Applied Arts and Technology.

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To accelerate implementation of vocational training reforms, the combined regulations for registration and accreditation of training institutions are expected to be undertaken during the 2010/11 financial year.

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These programmes have been developed in collaboration with industry, the University of Botswana and the Tertiary Education Council to ensure that they are relevant to labour market requirements and articulate with the requirements of tertiary education – the latter being crucial to improving vertical and horizontal mobility through the education and training system.

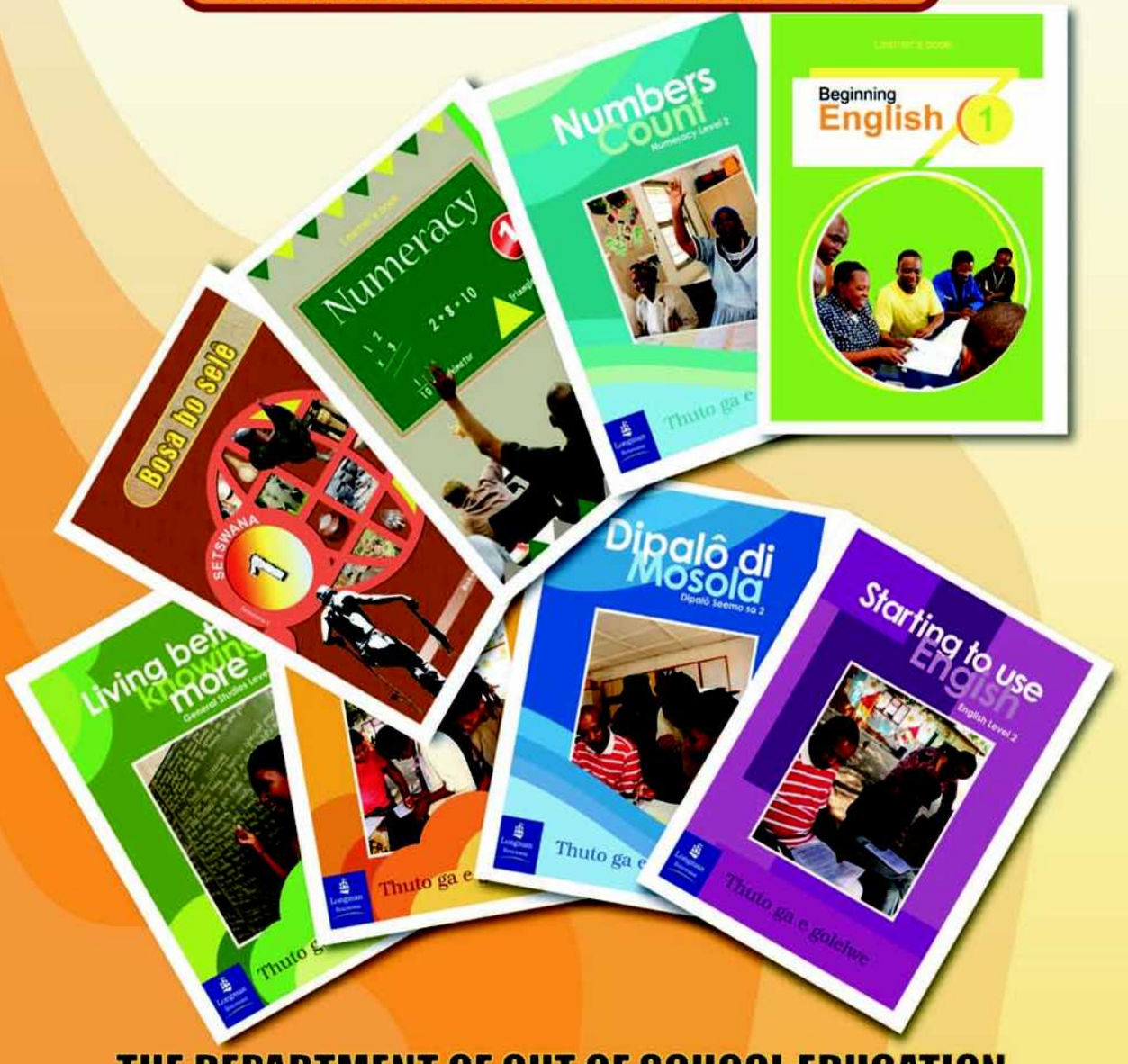
(continued on page 156)

Republic of Botswana

ADULT BASIC EDUCATION PROGRAMME (ABEP)

THUTO GA E GOLELWE

TOWARDS FUNCTIONAL LITERACY



THE DEPARTMENT OF OUT OF SCHOOL EDUCATION AND TRAINING

We have moved forward.

The Adult Basic Education Programme offers learners an equivalence of the Primary School Leaving Certificate

HUMAN RESOURCE DEVELOPMENT ADVISORY COUNCIL

VISION STATEMENT AND STRATEGIC GOALS

VISION

By 2022 it will be universally accepted that the quality, productivity and motivation of its people will be Botswana's single greatest and most valuable resource.

MISSION

Botswana's national human resource development mission will be to encourage each citizen to realise their individual potentials, through an approach which balances need and capability, to enable them to play a full and meaningful role in the community, society and the world.

VALUES

The following values will underpin each goal, objective and programme activity:
Equity
Quality
High performance standards
Accountability

The National Human Resource Development Strategy (NHRDS) was approved by His Excellency the President on the advice of Cabinet on 21 January 2009 with a request for its immediate implementation.

To discharge the responsibility of 'immediate implementation' of the NHRDS the Human Resource Development Advisory Council (HRDAC) was established by Presidential Directive (CAB 19 (B)/2009) issued on 9 July 2009. The HRDAC is a non statutory advisory Council which has been tasked with driving the implementation of the NHRDS to 2012, at which point it will cease to exist, with its work being taken over by the statutory Human Resource Development Council.

The mandate of the Council requires it to perform two distinct functions namely (a) advise the Government on the establishment of the Human Resource Development Council and (b) drive the implementation of the NHRDS up until the point that the statutory Human Resource Development Council will have been legally established and operational. The specific mandate of HRDAC is derived from the NHRDS Implementation Framework. The specific actions for HRDAC to accomplish over the period 2009-2012 are set out below.

Period	Actions
2009 to 2010	a. Launch of Human Resource Development Advisory Council and Strategy b. Appointment induction and capacity development of Council and Sectoral Committees c. Induction, orientation and capacity development d. Development of Sector and National HRD Planning framework e. Initiation of Sector Planning, orientation of key Sectoral Committees and capacity development f. Communication, stakeholder engagement, change management and capacity development
2010 to 2012	g. HRDC Legislation developed and approved h. Human Resource Development Council designed and established i. Six Sector Committees established and operational j. Development of six sector specific Human resource development plans k. Development of synoptic NHRD plan to inform the mid- term review of NDP10 l. HRD Planning and Data Systems – designed and ready for establishment m. Provision of strategic advice to Government on the implementation of the NHRDS n. Annual NHRD Conference and Annual NHRDS Performance Report initiated by 2012 o. Communication, stakeholder engagement, change management and capacity development

National Human Resource Development Strategy

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The NHRDS is a macro level initiative to ensure that ***'by 2022 it will be universally accepted that the quality, productivity and motivation of its people will be Botswana's single greatest and most valuable resource'.***

Work on the NHRDS commenced during the latter part of NDP9 when the Government requested the Tertiary Education Council to lead and manage the preparation of a study to formulate a national human resource development strategy. The formulation study which was undertaken during 2006-2007 was supported by the European Commission and was an indicator of the EDF9 Education and Training Sector Policy Support Programme. The ***National Human Resource Development Strategy (NHRDS), Realising our Potentials*** was subsequently presented to the Cabinet in January 2009 and approved for implementation by His Excellency the President. (CAB 1(B)-FDPS 1/3/41). The NHRDS has received high-level commitment and support, as highlighted by His Excellency, President Khama, in his Address to the Nation in November 2008 in the following terms: ***"There is a mismatch between our graduates' skills set and workplace demands, which further contributes to the challenge of unemployment. A holistic Human Resource Development Strategy is being formulated as achieving high income status will require an enhanced skills base".***

The NHRDS is at the cornerstone of the current National Development Plan (NDP 10) and provides the key strategic link to enable the successful attainment of seven ***Vision 2016*** pillars. It also represents the ***'breakthrough'*** strategy that will enable Botswana to realise the national transformation and diversification agenda. The Strategy focuses on the need for Botswana to successfully deal with a rapidly changing national context, as well as a highly competitive global market place. Successful implementation of the NHRDS is a necessary pre-condition for the realisation of the ***'Botswana Excellence Strategy'***. As the ***Excellence Strategy*** states: ***"Government is acutely aware that ... past achievements will not automatically translate into future successes, unless the country is able to change dynamically to meet new regional and global challenges. In response Botswana has to rapidly adapt to this quickly changing world so as not to fall behind in terms of development, competitiveness and its international standing".***

STRATEGIC GOALS

1. **Our collective goal as a nation is to:**
   Harness the full human resource capacity of the nation by providing opportunities for Batswana to realise their full potential across all stages of the human resource development life cycle so as to build a stable, prosperous and globally competitive nation.

2. **Our personal goal as individuals is to:**
   Achieve my full potential as an individual by assuming a personal responsibility for my own self-development through determination, courage, self sacrifice, and by recognising that I am ultimately answerable for ensuring the maximisation of my own abilities.

Both the Excellence Strategy and the NHRDS recognise the strategic role of human resource development with each citizen playing a meaningful role in their community, society and the world. The NHRDS is also a key contribution to ensuring that Botswana is a 'nation at work' with its people employed in high-skill, high-value jobs in their communities, nationally and globally by interlinking education outcomes to employment, growth and poverty reduction.

The National Human Resource Development Strategy (NHRDS) is at the core transforming Botswana from a ***Stage 1 Factor Driven Economy*** (reliant on natural resources and unskilled labour) to a ***Stage 2 Efficiency Driven Economy*** with higher value quality jobs, higher wages, efficient production processes, increased product quality, efficient markets and the harnessing of the benefits of existing technologies. This will lay the foundation for a subsequent evolution of Botswana into a ***Stage 3 Knowledge and Innovation Economy*** which will provide a high standard of living for its citizens and associated high wages by producing new and innovative goods, developing sophisticated production processes with well educated and highly trained 'knowledge workers.'

The NHRDS is at the apex of a number of strategic interventions designed to strengthen Botswana's education and skills training system. The current institutional framework for education, skills training and development and employment forecasting is an uncoordinated set of fragmented sub systems which is insufficient to respond to the national agenda of transformation and economic diversification. This has led to a lack of coherence, lack of policy breadth; lack of horizontal and vertical integration all impact negatively on the realisation of the national human resource development agenda. The principal approach of the NHRDS is to create an integrated approach to human resource development which breaks down the institutional silos and barriers. This will be achieved through the establishment of a Human Resource Development Council which will offer a single strategic focus to national human resource development.



The NHRDS articulates an overarching vision and strategy to enhance the coherence and effectiveness of what has been previously established. This includes the Botswana Examinations Council, Tertiary Education Council and Botswana Training Authority. The Strategy also seeks to ensure alignment with new and emerging initiatives such as the National Credit and Qualifications and Labour Market Observatory Projects. Finally the Strategy seeks to develop new system level structures, systems and ways of doing things that will improve the alignment of national human resource development and enhance the employability and economic benefits of its citizens.

Furthermore, the National Qualifications Framework should facilitate accreditation and transfer of credits across institutions, as well as feeding into the Southern African Development Community (SADC) Regional Qualifications Framework.

Covering vocational training from BOTA-accredited institutions, the Vocational Training Fund (VTF) aims to encourage workplace training for employees as a means of increasing innovation and production. Established in 2008, the fund supports cost sharing in skills development and equal sharing between enterprises in financing training activities.

All employers with an annual turnover of P250 000 and over are required to contribute to the fund. It is envisaged that the VTF will lead to a better 'fit' between employee skills and economic needs, which will in turn result in increased efficiency and enterprise growth. In keeping with the emphasis on realigning worker skills and market needs, a Labour Market Observatory Unit was to be established in 2010 to assist in planning and workplace skills development.

The private sector is increasingly taking the initiative to help enhance the quality and standard of training in Botswana by establishing their own training centres. Examples of skills development by private institutions with public sector support include apprenticeship programmes offered by The Botswana Institute of Bankers and the International Financial Services Centre.

Training institutions

To enhance human resources development, especially vocation and technical skills, ***Madirelo Trading and Testing Centre*** started modernising its apprenticeship and industrial training curriculum in October 2008 by converting it into a Competency Based Modularised Training System. The modernisation process is expected to be completed in December 2012. In addition, the centre has embarked on training in scarce vocational areas like solar energy.

Through the ***Construction Industry Trust Fund (CITF)***, short-term modularised competency based training is offered in construction trades. At present, CITF is focusing on skills training and development programmes aimed at reducing the reliance on imported semi-skilled and skilled construction labour. In addition, the CITF and MTTC are being merged under the Ministry of Labour and Home Affairs.

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RATIONALISING OF INSTITUTIONS

In the 201011 budget it was announced that the Construction Industry Trust Fund (CITF) is to be merged with Madirelo Trades Testing Centre (MTTC) under the Ministry of Labour and Home Affairs, while the Botswana Training Authority (BOTA) will be merged with the Tertiary Education Council (TEC) under the Ministry of Education and Skills Development.

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The decision to take over brigades and convert them into technical colleges will enable these institutions to offer new and more relevant qualifications, including courses up to diploma level. Of the 41 brigades to be taken over, 25 will be upgraded into technical colleges while the rest will become campuses of already existing colleges. By the beginning of the 2010/11 financial year, 21 brigades had been taken over by government.

The Botswana government and Debswana established the ***Botswana Accountancy College (BAC)*** in 1996 to cater for accountancy, business and information technology training, with students qualifying through both the Association of Chartered Certified Accountants (ACCA) and Chartered Institute of Management Accountants (CIMA) examinations. Apart from professional accounting qualifications, the college has introduced other courses, such as software engineering, applied business computing, insurance programmes, internal auditing and Masters Degree programmes in strategic management. In 2010, BAC was transferred from the Ministry of Finance and Development Planning to the Ministry of Education and Skills Development.

The ***Botswana National Productivity Centre (BNPC)*** was established in December 1993 with a mandate to promote productivity awareness throughout the country as well as best management practices in all sectors of the economy. The BNPC has been responsible for the implementation of the Performance Management System (PMS) within government, which was adopted in an effort to maintain a productive labour force and cultivate a culture of efficiency. Training and consulting interventions in Quality Management Systems or ISO Standards, Service Quality and Supervisory Development Programmes are carried out. (Further information on the BNPC may be found in the *'Commerce and Industry'* chapter.)

The ***Botswana Institute of Administration and Commerce (BIAC)*** plays a very important role in improving productivity in the public service by developing and delivering a diversity of quality seminars and short courses for public officials. The demand for BIAC training programmes has escalated over the years, with courses including National Certificate in Accountancy and Business Studies, Secretarial Studies and Computing, and in-service training courses for public officials in areas such as business, accountancy, public relations, communication and IT awareness, public administration and management. BIAC has developed tailor-made short programmes intended to address the problem of skills development at leadership and operational levels, thereby accelerating the transformation of the public service.

Colleges of Education Project

For 2010/11, ongoing initiatives receiving funding in the Colleges of Education Project include Oodi College of Applied Arts and Technology (CAAT), Gaborone Technical College upgrading and Serowe and Francistown Colleges of Education. The planned construction of a College of Applied Arts and Technology in Selebi-Phikwe has been abandoned. Instead of building a new college, government is to upgrade the present Selebi-Phikwe Technical College.

Oodi CAAT will open with an initial student intake of about 350. When fully functional, the college will be able to accommodate 1 500 students with a staff complement of 176 lecturers and technicians. Serowe College of Education opened its doors in 1963 and today has 419 students. Refurbishment at Serowe includes renovation of lecture rooms, hostels and teachers' houses, as well as new science and mathematics laboratories, two soccer fields, basketball, volleyball, tennis and netball courts and 16 additional staff houses.

UNIVERSITY OF BOTSWANA

Notable progress has been made by the University of Botswana (UB) since its establishment in 1982. Today the university comprises three campuses and has a presence in ten other towns. The main UB campus is situated in Gaborone and occupies 115 hectares, with classroom space

WORLD'S BEST

Limkokwing website wins USA awards for creativity



The Limkokwing University's presence in cyber-space is a complex network that requires dexterity in managing information for a wide range of purposes. Users come from across the world in 190 countries and the demands are varied resulting in 108 million hits in 2009 alone.

108 million hits from 190 countries

The University's staff, faculty and students from 11 campuses in 8 countries access the website to interact while others across the world find the website an interesting place to linger. A hardworking location that keeps up with the activities of the University, it has been innovative in creating the digital roadmap sustaining the efficiency of the multifaceted operations of a fast-growing global operation.

Engineered for easy accessibility

The world is able to access the website through search engines like Google and online promotions in places like facebook.com, youtube.com, businessweek.com, wsj.com, among many others that attract traffic to the site.

Website managed by Limkokwing web wizards

Managed by alumni working within the University's professional unit, known as Worldwide Web Domination (W3D) within the Centre for Content Creation, the website has been singled out for a series of awards from the United States over the past two years. Criteria for judging included design, innovation, content, technology, interactivity, copywriting and ease of use, with the Limkokwing website scoring points that were above industry average.

2010 Awards

- The 40th Creativity Media Competition 2010 - Silver Award in New Media & Web Design (Blog) category by Creativity International Awards.
- The 40th Creativity Media Competition 2010 - Honourable Mention for the University in Website Consumer category. All winners will be featured in the 40th Creativity Annual Book that will be published in 2011.

LIMKOKWING UNIVERSITY OF CREATIVE TECHNOLOGY
WORLDWIDE

2009 Awards

- IMA (Interactive Media Awards) Outstanding Achievement Award under the University category.
- Web Marketing Association 2009 WebAward for Outstanding Achievement in Web Development for Best Arts Website.
- DesignFirms Web Design Award for the month of April 2009. This is the world's largest and most respected design community and marketplace.

Plot 59140, Gaborone, Botswana +(267) 318 0135 +(267) 318 0056 www.limkokwing.ac.bw

for over 10 000 students and hostel accommodation for more than 4 300 students. Total overall enrolment for both undergraduate and post graduate students stood at 14 706 in 2009/10.

The university library has the largest library collection in Botswana and is one of the best of its kind in Africa, with library resources comprising 450 771 books, 31 308 pamphlets, 1 027 periodical titles, 96 714 full text journals, six OPAC terminals, 182 dedicated Internet workstations, 19 901 registered users and seating capacity for 1 168. The Main Library houses collections which support learning, teaching and research needs in the faculties of Business, Education, Humanities, Sciences and Social Sciences. Designated one of the legal deposit libraries in Botswana, it also holds Botswana Documentation & Special Collections, including the University of Botswana Archives, the Tshekedi Khama Papers and the Noma Award Archives.

Other libraries comprise the Faculty of Engineering and Technology (FET) Library, which became a branch of UB in 1996 following the incorporation of Botswana Polytechnic into the university; the HOORC Library located in Maun, which serves a broad community of researchers and stakeholders involved in studying and managing the Okavango Delta region; and the Centre for Continuing Education (CCE) North Library located in Francistown.

The ongoing UB Expansion Programme encompasses the construction of two new multipurpose buildings comprising classrooms, laboratories, lecture halls and offices, buildings intended to house the Faculty of Engineering and Technology and Faculty of Health Sciences, a new Student Services Centre and a new indoor sport, fitness and exercise science building.

Faculties and programmes

Currently six faculties – namely Business, Education, Engineering and Technology, Humanities, Science and Social Sciences – offer full-time and part-time study programmes leading to undergraduate and postgraduate degrees. A School of Graduate Studies coordinates graduate studies across all faculties. Programmes are taught from Certificate, Diploma and Bachelor's degrees through to Masters' and Doctoral degrees in a number of disciplines in these faculties.

The establishment of a Graduate School of Business under the Business Faculty has been proposed. This would focus on the expansion of graduate programmes, executive education, provision of consultancy services and the delivery of a more research-intensive mission in order to become a centre of excellence in business education, research and engagement with industry.

Medical School

A Medical School has been opened in the Faculty of Health Sciences facility at the University of Botswana. The Bachelor of Medicine Bachelor of Surgery (MBBS) degree is a five-year programme. The first two years follow an integrated Problem Based Learning (PBL) approach, while the last three are clinically structured.

Scheduled for completion by 2013, a 450-bed teaching and referral hospital is also being built within the premises of the university at a cost of P2.3 billion. The facilities will be used to train doctors and other health professionals as well as serving as a referral centre.

Centres of excellence

The main campus in Gaborone occupies 115 hectares, with the Faculty of Engineering and Technology currently located on its own campus approximately one kilometre from the main campus. Additional off-campus part-time continuing education takes place at sites located in Francistown, Maun, Ghanzi, Jwaneng, Mahalapye, Lobatse and Selebi-Phikwe.

Establishing in 1999, the Centre for Academic Development promotes and supports academic excellence through five key units, which comprise: Academic Programme Review; Affiliated Institutions; Communications and Study Skills; Educational Technology; and Teaching and Learning.

The Centre for Continuing Education (CCE) offers credit and non-credit programmes at degree and non-degree levels within the framework of lifelong learning through distance education, part-time evening classes and other extension activities.

Affiliated academic centres provide consultancies and information services covering a wide range of issues, from the economy and politics to science and technology, agriculture and the environment, human rights and health care delivery. The Office of Research and Development (ORD) was set up in 2001 with the overall goal of enabling UB to improve its research performance.

Research centres and centres of study include the Harry Oppenheimer Okavango Research Centre (HOORC), a world-class centre of academic excellence for the study and conservation of the world's largest and most intact wetland ecosystem – the Okavango Delta. Other centres comprise the International Tourism Research Centre, Centre for Strategic Studies (CSS), Centre for Culture and Peace Studies, Centre for the Study of HIV and AIDS, and the Centre for Scientific Research, Indigenous Knowledge and Innovation (CESRIKI).

An associate college, the Botswana College of Agriculture (BCA), offers university degrees and diplomas in agriculture and related fields.

BOTSWANA INTERNATIONAL UNIVERSITY OF SCIENCE & TECHNOLOGY

The country's second university, the Botswana International University of Science and Technology (BIUST) is being established to increase access to tertiary education and facilitate development of Botswana's human resources in skills and competencies that will promote research and innovation. It is located in Palapye, 270 kilometres north of Gaborone.

BIUST is intended to redirect the country's human resources development towards science and technology and produce a skilled and competent workforce that will facilitate technology transfer and absorption, increase productivity in all sectors of the economy and facilitate economic diversification, growth and development. BIUST will seek to partner with industry as well as local and international institutions to facilitate exchange programmes and work attachments to ensure relevance to the world of work for both staff and students. A strong research component will assist in attracting and retaining faculty and researchers of good standing, with a Business Incubator and Business Park envisaged for the profitable development of research projects.

BIUST is expected to open its doors in March 2011 with four faculties: Engineering, Technology, Science and Business and General Education. It will offer courses such as evolutionary genetics, forensic chemistry, human computer interactions, industrial mathematics, applied nuclear physics, insurance and investment fund management. When fully operational, BIUST will be able to host a student body of 6 000.

BOTA

BOTSWANA TRAINING AUTHORITY



Up-skilling Batswana

Vocational Training Fund

Train your citizen employees and claim from the fund.

NOTE: The programme or course should be BOTA accredited OR if the training is outside BOTSWANA contact BOTA for pre-approval.

Application for reimbursement

- Training claims must be on a Prescribed Form obtainable from BOTA or downloaded from the BOTA website www.bota.org.bw
- Original receipts of tuition, accommodation, meals and stationery
- Certified Omang
- Certified trainee transcripts or certificates
- Certified records of attendance
- Approval letter if training is conducted outside Botswana

For more information contact BOTA

H&C MAGAZINE BOTAAD 2010/03

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E-mail: info@bota.org.bw
Website: www.bota.org.bw

MAP OF BOTSWANA

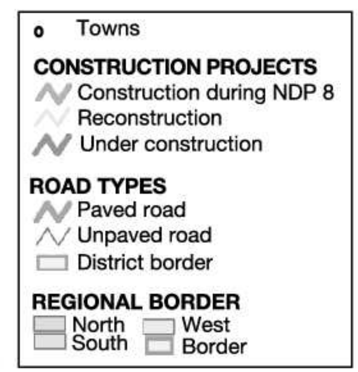


THE DEPARTMENT OF ROADS (BOTSWANA)
KILOMETREAGE CHART

The kilometreage of the most practical (not necessarily the shortest) route are shown in the chart.
Distances do not include accesses to the Kgotlas or Village Centres.

Town	Baine's Drift	Bokspits	Francistown	Gaborone	Gantsi	Gweta	Hukuntsi	Jwaneng	Kang	Kanye	Kasane	Kazungula	Letlhakane	Letlhakeng	Lobatse	Mahalapye	Maitengwe	Makalamabedi	Mamuno	Martin's Drift	Maun	McCarthy's Rust	Mochudi	Molepolole	Mopipi	Nata	Ncojane	Ngoma	Nokaneng	Orapa	Palapye	Pandamatenga	Parr's Halt	Pilane	Pioneer Gate	Rakops	Ramatlabama	Ramokgwebana	Ramotswa	Sebina	Sefophe	Sehithwa	Sekoma	Selibe-Phikwe	Serowe	Serule	Shakawe	Sikwane	Thamaga	Tlokweng Bp	Tonota	Tsabong	Tutume	Werda	West Mohembo
Baine's Drift
Bokspits	1185
Francistown	275	1203
Gaborone	418	767	436
Gantsi	1083	879	769	665
Gweta	561	1362	286	722	463
Hukuntsi	925	496	936	507	373	656
Jwaneng	580	606	597	162	503	986	346
Kang	817	613	828	399	265	748	108	238
Kanye	508	684	525	90	581	811	424	78	316
Kasane	766	1695	492	927	788	402	1159	1080	1051	1017
Kazungula	759	1688	485	920	779	395	1153	1082	1045	1010	7
Letlhakane	458	1274	249	507	660	517	1033	666	925	596	723	716
Letlhakeng	766	821	552	117	541	1024	383	215	276	143	1044	1037	623
Lobatse	490	734	507	72	631	793	474	128	366	50	999	992	578	188
Mahalapye	247	968	235	201	858	521	701	362	593	268	726	720	308	317	272
Maitengwe	421	1349	146	582	815	332	1082	743	974	672	538	531	378	698	653	381
Makalamabedi	769	1227	543	618	349	157	722	852	614	908	559	552	311	669	889	617	490
Mamuno	1205	809	1036	787	208	691	495	626	386	704	1367	1360	668	664	754	981	1023	557
Martin's Drift	113	1099	274	331	969	560	831	493	723	421	766	759	345	446	403	134	420	656	1111
Maun	764	1158	490	887	278	204	652	782	544	860	507	500	361	820	959	687	536	70	487	728
McCarthy's Rust	960	277	878	542	653	1200	270	381	388	459	1469	1463	1049	596	509	743	1124	1065	584	873	996
Mochudi	419	810	407	42	700	693	543	204	435	132	800	793	478	159	114	172	553	789	823	303	859	584
Molepolole	469	755	486	51	607	772	450	149	342	77	978	971	557	66	122	251	632	868	730	382	938	529	93
Mopipi	544	1361	318	593	573	316	946	755	838	683	720	713	87	710	665	393	1014	224	781	432	294	1135	565	644
Nata	462	1391	188	623	581	98	954	785	846	713	304	297	419	740	695	423	234	255	789	462	302	1166	595	674	416
Ncojane	1308	699	1080	711	311	784	204	549	312	628	1490	1483	971	587	678	904	1266	860	110	1035	590	474	746	653	884	892
Ngoma	823	1751	548	775	841	459	1315	1145	1207	1074	57	64	780	891	848	783	595	816	1149	822	682	1528	956	825	777	361	1252
Nokaneng	971	1233	896	1019	1195	410	1568	1089	1461	1167	812	805	567	1738	1217	893	743	276	1403	932	206	1007	1065	1802	500	508	1506	869
Orapa	475	1295	229	528	636	1069	1010	696	902	618	703	695	21	645	600	327	357	288	844	366	357	1070	500	579	63	399	947	760	554
Palapye	223	1040	163	272	930	449	772	434	664	362	655	648	234	389	344	72	309	545	1052	111	615	814	244	323	321	351	976	712	821	256
Pandamatenga	661	1569	386	822	1073	297	1447	983	1339	912	105	99	618	938	893	621	433	454	1261	660	500	1364	793	872	615	198	1364	162	707	587	550
Parr's Halt	216	834	307	247	905	593	746	409	640	337	789	782	378	364	319	72	453	689	1028	103	759	608	219	298	465	495	851	856	865	400	144	693
Pilane	412	803	400	35	693	686	536	197	428	125	892	885	471	152	107	165	548	782	816	298	852	577	7	88	558	588	739	949	1058	493	237	788	212
Pioneer Gate	497	742	515	79	639	801	482	136	374	58	1007	1000	566	196	8	280	661	897	782	411	967	516	122	130	673	703	685	1063	993	607	352	901	327	115
Rakops	611	1427	385	660	506	251	880	822	772	750	853	847	153	777	732	459	496	158	714	498	227	1202	632	711	67	350	817	710	434	130	388	548	532	625	739
Ramatlabama	539	775	557	121	672	843	515	169	407	91	1048	1041	628	238	49	322	496	939	795	452	1008	549	163	172	714	744	718	1105	1025	649	393	943	368	156	57	781
Ramokgwebana	352	1260	77	513	611	326	1013	675	905	603	534	527	326	630	565	312	224	465	1019	351	532	1055	476	564	396	230	1122	590	736	306	241	426	385	476	592	463	634
Ramotswa	452	771	469	34	668	755	511	217	403	93	961	954	540	151	58	235	616	852	791	365	921	545	76	64	627	657	714	1018	1022	562	306	856	281	69	66	694	108	547
Sebina	329	1258	55	490	724	241	991	652	883	590	447	440	266	607	562	290	91	398	932	329	445	898	462	541	338	143	1035	504	651	266	218	341	362	455	570	405	611	87	524
Sefophe	101	1158	173	390	1012	459	890	552	782	480	865	858	352	507	462	190	319	863	1170	124	733	932	362	441	439	361	1094	722	939	374	118	559	209	355	470	506	511	251	424	228
Sehithwa	862	523	587	910	245	301	618	748	510	826	703	698	478	788	876	784	634	167	453	823	97	898	958	852	391	399	556	780	109	455	712	598	856	949	884	325	917	629	913	542	830
Sekoma	662	1174	880	244	421	903	263	83	155	161	1171	1165	751	298	211	445	826	760	543	575	699	298	287	232	838	868	467	1228	775	772	517	1068	402	280	219	904	252	757	248	735	835	665
Selibe-Phikwe	129	1064	146	407	1028	432	907	566	799	497	636	631	369	523	476	206	292	680	1167	151	749	949	378	457	455	334	1110	57	956	390	134	532	236	371	486	522	526	223	441	201	27	847	651
Serowe	268	1116	208	317	649	494	817	476	709	407	699	693	190	433	366	116	354	501	1097	155	570	859	268	367	276	396	1021	756	777	211	45	594	188	281	398	343	438	285	351	263	163	668	561	179
Serule	187	1403	67	348	970	373	846	510	740	438	579	572	310	465	420	147	234	621	1128	187	691	890	320	399	397	275	1052	636	897	332	76	474	220	313	428	464	469	165	382	142	66	788	592	59	120
Shakawe	1141	834	886	1263	524	560	897	1027	789	1105	982	975	757	1065	1155	1093	913	446	732	1102	376	1177	1235	1131	670	678	835	1039	170	734	991	877	1135	1228	1163	603	1196	906	1192	821	1039	279	944	1012	947	953
Sikwane	461	722	449	67	725	735	567	229	459	157	941	934	520	184	139	215	596	832	847	345	601	609	42	118	607	637	771	968	1079	542	286	836	261	49	146	674	188	527	101	504	404	970	311	421	331	362	1248
Thamaga	464	722	481	46	619	767	462	116	354	44	973	966	552	99	117	246	627	863	742	377	933	498	88	33	639	669	665	1030	973	574	318	868	293	81	125	708	135	559	49	536	436	664	199	452	363	394	1143	113
Tlokweng Bp	441	790	458	23	661	744	523	185	415	113	950	943	529	140	95	224	605	841	803	354	910	565	65	74	616	646	727	1007	1035	551	295	845	270	56	102	663	144	536	57	513	413	925	267	430	340	371	1204	90	69
Tonota	245	1173	30	406	798	316	905	566	798	496	521	514	278	523	476	205	176	473	1006	244	519	948	378	457	348	217	1110	578	726	258	134	416	278	371	485	415	527	107	440	64	144	617	650	116	176	58	896	420	452	429
Tsabong	934	251	952	516	628	1111	245	355	362	433	1444	1437	1023	570	483	717	1098	976	558	848	907	26	559	504	1110	1140	448	1500	982	1044	789	1338	583	552	491	1176	524	1029	520	1007	907	873	272	923	833	865	1152	583	471	539	922
Tutume	373	1301	98	534	767	285	1034	695	926	624	490	483	608	650	605	333	48	442	975	372	488	1078	505	584	381	186	1238	547	895	308	282	385	405	488	613	448	655	176	568	43	271	586	778	244	306	186	865	548	579	557	128	1050
Werda	791	394	809	373	485	967	327	212	219	290	1300	1294	880	427	340	574	966	833	607	704	783	169	416	380	966	997	531	1367	839	901	646	1195	621	409	347	1033	380	886	376	864	763	729	129	780	690	721	1008	440	327	398	779	143	907
West Mohembo	1155	1417	881	1203	538	595	912	1042	804	1120	997	990	772	1079	1170	1077	927	460	746	1116	391	1192	1250	1145	685	693	549	1053	184	746	1006	891	1150	1243	1177	618	1210	923	1209	836	1124	294	959	1027	961	968	15	1270	1158	1226	910	1166	879	1023
Zanzibar	26	1159	248	392	1087	534	892	553	784	482	740	733	427	506	463	202	394	738	1172	86	608	934	363	442	514	436	1095	767	1015	449	193	634	171	356	471	561	513	326	426	303	75	905	636	102	238	161	1184	406	437	415	219	908	346	765	1199





(continued from page 68 - TOURISM INDUSTRY)

The nearby ***Motloutse Ruins*** were first occupied by Bushmen hunter-gatherers and then successive Bantu tribes, who began to mine gold at the site. The discovery of glass beads is evidence of their contact with Arab traders.

Between the Tuli Block and Serowe, the flat-topped ***Tswapong Hills*** stretch some 60 kilometres east to west, towering dramatically over the surrounding plains. The hills form a microclimate of lush vegetation, waterfalls and rock pools, comprising a variety of flora and fauna. There are also various archaeological sites where iron smelting and pottery kilns have been discovered.

The ruins of Old Phalatswe Church, a Gothic building constructed by the Bangwato in 1892, may be found at the foot of the hills some 20 kilometres east of Palapye. Also in the vicinity, the ***Lepokole Hills*** north of Bobonong are the southernmost extension of Zimbabwe's Matopo Hills, and contain Basarwa rock art, pottery shards and stone-age tools.

The magnificent waterfalls, pristine rock pools, spectacular cliffs and luxuriant vegetation of ***Moremi Manonnye Gorge*** are to be found approximately 67 kilometres east of Palapye. A conservation trust run by the local community, the gorge contains a variety of amphibians, reptiles, mammals and birds.

It is said that life began when the legendary ancestor of the Tswana, Matsieng, emerged from a cave followed by his people and animals. Situated near Rasesa Village, ***Matsieng's Footprints*** may today be seen embedded in the sedimentary rock. While studies of the site suggest that there were once many prints, including the giant-sized one and animal tracks, most of these have since eroded or disappeared due to exposure to animal and human movement as well as sunlight and rain. Despite the legend, archaeological evidence shows that the prints are man-made. The site was fenced in 2004 to limit the movement of people and animals.

Other sites of archaeological importance include the Vukwi Ruins near Francistown, which resemble a small-scale Zimbabwe Ruins, and Toutswe Mogala which, together with sites in South Africa, forms part of a complex of prehistoric settlements occupied between 1000 and 1700 AD.

(continued from page 88 -PROPERTY DEVELOPMENT AND HOUSING)

The Deeds Registry and the Legal Division have been transferred from the Attorney General's Chambers to the Ministry of Lands and Housing. Deeds Registry ensures speedy registration of title and certainty of land rights, with an average of 1 000 transactions per month and a turnaround time of six days within which titles are obtained.

Land boards and records management

Land boards hold in trust 70 percent of Botswana's land. In order to improve coordination of the functions and responsibilities of land boards, a Department of Land Board Services has been established.

Responsibilities of the Department of Land Board Services include the administration of land board staff and finances and tribal land management, the first two functions having hitherto been performed by the Ministry of Local Government. Proposed amendments to the Tribal Land Act will harmonise the functions of the land boards with the wider functions of the ministry.

The Ministry of Lands and Housing has developed guidelines for the allocation and transfer of tribal land to non-citizens. As such, non-citizens only acquire tribal land when they are in partnerships with citizens, except in exceptional circumstances where allocation may occur directly. Alternatively, non-citizens may lease from citizens. Similar conditions are being considered for state land.

Land records management facilitates effective and efficient land delivery through the monitoring of land allocation in both tribal and state land. The computerised State Land Integrated Management System (SLIMS) and the Tribal Land Integrated Management System (TLIMS) were piloted in February 2005. These systems give land boards easy access to information that is vital for decision making, thereby also facilitating the equitable distribution of land.

Surveys and mapping

The National Mapping Programme augments national and village mapping. Digital aerial photography for 100 settlements was completed in 2008. This was the first time settlements had been photographed with a digital camera, allowing simultaneous black and white, coloured and infrared photography to be integrated for much higher resolution and greater accuracy in mapping.

A major project undertaken by the Department of Surveys and Mapping, the Integrated Geographic Information System (IGIS) project was completed and launched at the end of 2007. The main objective of this project was to provide geo-information data in a format which is readily usable and accessible to all other stakeholders, particularly in the implementation of development projects. The major focus was the integration of three main spatial databases at the department: the cadastral, geodetic and topographic databases.

The geo-database currently holds orthophoto maps of the whole country, topographic maps tiled to 1:50000 scale and a number of village maps at scale 1:5000. It has been populated with geodetic and cadastral information, digital orthophoto maps derived from aerial photography, digital topographic maps, street and plot numbers, and constituency maps.

A remote sensing infrastructure has been established at the Department of Surveys and Mapping. This is enabling the management, processing and dissemination of digital satellite images, improving production and revision of maps and increasing access to information essential in the sustainable development and management of land and related resources.

Land use and development plans

Botswana has one of the fastest rates of urbanisation in the world due to the establishment of new towns and rural-urban migration. Development plans are prepared for settlements in an effort to facilitate orderly village development, with land users able to determine opportunities available for development through such plans. On the basis of settlement development plans, detailed layout plans are prepared in order to guide land allocation bodies in providing land for various uses. They are also essential in facilitating efficient provision of infrastructure and services.

Two regional master plans for the Western and South Eastern regions cover a period of 24 years – 2000 to 2024 and 2003 to 2027 respectively – to guide, control and ensure sustainable development in those regions. Furthermore, district settlement strategies have been prepared, all with a planning horizon of 24 years, for the Kweneng, Kgatleng, Chobe, Southern and Ngamiland districts.

Land servicing and acquisition

Land servicing is ongoing, with a total of 605 plots serviced in Kasane between April 2009

and February 2010. A further 9 763 plots are being serviced in Gaborone (Tsholofelo area), Jwaneng (Unit 8), Lobatse (Airstrip plantation) and Francistown (Gerald Estates). The land servicing programme is also being extended to rural centres with the designs currently ongoing for Metsimotlhabe (Block 4) and Palapye (Extension 11).

To facilitate speedy allocation of land to investors, about 270 000 hectares of land as well as eight concession areas have been reserved for the ministries of Trade and Industry, Environment, Wildlife and Tourism, and Agriculture. Acquisition of land will also continue through negotiations with owners of land around towns, with government in the process of acquiring 5 570 hectares of tribal land for incorporation into Gaborone.

Old Naledi Infrastructure Upgrading Project

The former squatter settlement of Old Naledi on the periphery of Gaborone is undergoing a P152 million facelift with the provision of essential infrastructure in what will be the one of the largest infrastructure projects ever handled by Gaborone City Council. The project includes provision of a sewerage network, tarred roads and associated storm water drainage systems, water reticulation and street lighting.

The project was preceded by a socioeconomic survey, which revealed the nature of the social networks in Old Naledi and the importance of the township as a home for the city's low-income workers. Some 1 045 plots have been affected: 28 of these will give rise to seven playgrounds, six will be incorporated into a plot that will house a clinic, five will be merged to house the Old Naledi Education Centre (formerly Makgasa School), four will be replaced with a taxi and bus rank, and eight will give way to roads and associated infrastructure.

USEFUL INFORMATION

FACTS & FIGURES

Land area: 582 000 square metres
Population: 1 776 000 *(2008 projection, Central Statistics Office Botswana)*
Capital city: Gaborone
Official languages: English and Setswana
Climate: Semi-arid
Weights & measures: The metric system
Time: Two hours ahead of GMT
Electricity supply: 250 volts

International telephone dialling code: International code + 267

CLOTHING

While Botswana is a hot and generally dry country, extremes of temperature occur in the winter months, when temperatures may drop to freezing point. Light, comfortable and casual clothing is advised, with warmer attire for early morning and evening outings. Safari clothing and comfortable shoes and wide-brimmed hats are suggested for game reserves and hiking expeditions.

CUSTOMS

The following goods, declared on arrival, are duty-free: Two litres wine, one litre spirits, 400 cigarettes, 50 cigars, 250 grams of tobacco, 50 millilitres perfume and 250 millilitres eau de toilette. Firearms must be licensed and declared on arrival. Handguns are illegal, as are .22 calibre rifles.

For further information, contact the Department of Customs and Excise, Private Bag 0041, Gaborone, tel 363 8000/392 2855, fax 363 9000.

ENTRY REQUIREMENTS

All visitors must be in possession of a passport valid for at least six months, except those with United Nations Convention travel documents. Visitors must also have outgoing travel documents and sufficient funds to finance their stay.

Entry visas may be obtained from Botswana's various embassies and high commissions abroad. In countries where Botswana is not represented, visas may be obtained from the British High Commission. While visas are not required for nationals of most Commonwealth countries, and some foreign countries with which Botswana has concluded visa abolition agreements, it is advisable to check with your travel agent in advance.

For further information, contact the Department of Immigration, PO Box 942, Gaborone, tel 361 1300.

HEALTH

Government hospitals and clinics offer afxfordable medical services. Private medical practitioners operate in all major centres, with Botswana's largest private hospital (tel 390 1999) situated in Gaborone. Travel insurance is recommended in case of unforeseen emergencies.

Botswana requires no inoculations except for visitors from yellow fever zones. While the country is not a risky place to visit from a health perspective, there are certain precautions visitors should take. As in many other African countries, the HIV/AIDS pandemic is of major concern, and visitors should observe standard prevention measures.

Anti-malarial tablets may be necessary when travelling to malaria areas such as northern Botswana and the Ghanzi region, and mosquito repellents and nets treated with insecticide are advised. To prevent tick bites, and the possibility of tick-bite fever, keep your body well covered when walking in the bush and use an insect repellent. Bilharzia may be present in streams and rivers, and it is best to stay out of the water.

2011 PUBLIC HOLIDAYS

New Year's Day	1 January
Good Friday	22 April
Easter Monday	25 April
Labour Day	1, 2 May
Ascension Day	2 July
Sir Seretse Khama Day	18 July
Botswana Day	1 October
Christmas Day	25 December
Boxing Day	26 December

INVESTMENT OPPORTUNITIES

Advice and information may be obtained from the Botswana Export Development and Investment Authority (BEDIA), Plot 28, Matsitama Road – off Queens Road, Main Mall; PO Box 3122, Gaborone, Botswana; tel 318 1931, fax 318 1941, e-mail: bedia@bedia.bw

MONEY & CURRENCY

The basic unit of currency is the Pula (P), which is divided into 100 thebe (t). Notes are in P10, P20, P50, P100 and P200; coins are in denominations of 5, 10, 25, 50, P1, P2 and P5.

While cash of any amount is not restricted,

any person entering or leaving Botswana is required to declare pula and/or foreign currency bank notes in their possession if the amount is equal to or exceeds an equivalent of P10 000.00 (ten thousand pula). Travellers' cheques and other monetary instruments need not be declared. Travellers' cheques may be exchanged at banks, bureaux de change and authorised hotels. The most easily convertible currencies are the Euro, US dollar, SA rand and British pound.

Major credit cards, including Visa, MasterCard, American Express and Diners Club, are accepted by most hotels, retail outlets, restaurants and safari companies. The majority of hotels and lodges accept foreign currency or travellers' cheques. There is a well developed network of automatic teller machines (ATMs) throughout the country at most shopping malls and major hotels. There are bureaux de change at border posts, where point of sale machines and credit card terminals may also available, as well as at national parks and regional wildlife offices. It is nevertheless a good idea to carry cash when visiting the more remote areas.

Normal business hours are from Mondays to Fridays between 08:00 and17:00, with government offices open weekdays from 07:30 to 16:30. Banks are generally open from Mondays to Fridays, 09:00 to 15:30, and on Saturdays between 08:30 and 11:00. Most shops open at 09:00 and close at 17:00 on weekdays and at 13:00 on Saturdays.

Important telephone numbers

Ambulance 997
Fire.....998
Police 999
Med Rescue 911

TOURISM

Information on Botswana can be obtained from The Botswana Tourism Board, Plot 50676, Fairgrounds Office Park, Block B, Ground Floor; tel 391 3111, Fax 395 9220, e-mail: board@botswanatourism.co.bw

National Parks & Game Reserves

Opening hours for parks and reserves are 06:00 to 18:30 (1 April - 30 September) and 05:30 to 19:00 (1 October - 31 March). Reservations should be made prior to arrival at Gaborone or Maun reservation offices, which are open between 07:30 and 16:30 from Monday to Saturday, closing for lunch from 12:45 to 13:45, and between 07:30 and 12:00 on Sundays.

Gaborone: Parks and Reserves Reservations Office, PO Box 131, Gaborone, Botswana; located in the Government Enclave of Gaborone, opposite the end of Queens Road. Tel: 318 0774, Fax: 318 0775, E-mail: dwnp@gov.bw.

Maun: Parks and Reserves Reservations Office, PO Box 20364, Boseja, Maun, Botswana; located next to Maun Police Station. Tel: 686 1265, Fax: 686 1264.

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CLASSIFIED SECTION

AIDS / HIV Information

Gaborone

THE AFRICAN COMPREHENSIVE HIV/AIDS PARTNERSHIPS (ACHAP) 393 38 42
Bag X033 Gaborone
FACSIMILE: 393 35 07

Accountants & Auditors

Gaborone

INDUSTRIAL MANAGEMENT AND ACCOUNTING SERVICES Box 40096 Gaborone 397 33 18
LAKISAMA ACCOUNTANTS & BUSINESS ADVISORS Box 80745 Broadhurst 318 22 16

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Cellular Phone: 71736913
Email: info@helicopterhorizons.com

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Plot 43163 Magang Dve Phakalane
Box 47360 Gaborone
FACSIMILE: 395 97 48
Email: info@alucraft.co.bw

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